

MICROSOFT

Microsoft® File

Data Management Program



Microsoft® File

Data Management Program

for the Apple® Macintosh™

Microsoft Corporation

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Microsoft File Addendum

You can use Microsoft File for the Macintosh with the new Imagewriter Wide Carriage, the 15-inch-wide version of the standard Imagewriter. With the new Imagewriter, and the printer driver supplied on your File disk, you can print pages up to 11 by 14 inches in size; and with either the new or the standard Imagewriter, you can print at 50 percent reduction, and with no breaks between pages. File also works with the standard Imagewriter driver.

The dialog boxes you will see for the Page Setup and Print commands are slightly different than the dialog boxes shown in this manual. For information on page setup and printing, please see the Printing topic in the About Microsoft File command.

Note

To copy the new printer driver to any of your other application disks, start Microsoft File and then copy the System icon and the Imagewriter 15 icon from the system folder onto your other disk.

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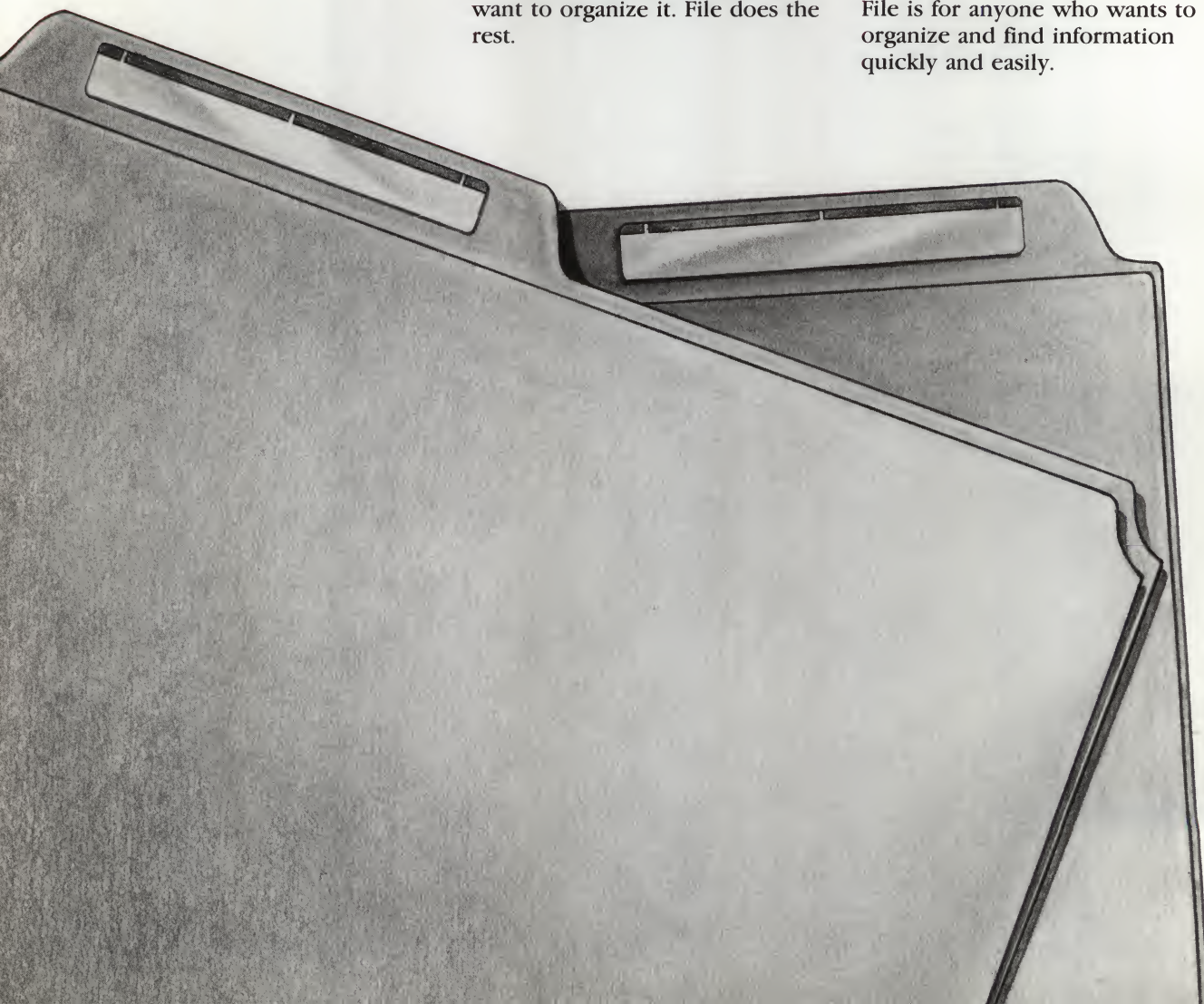
Welcome . . .

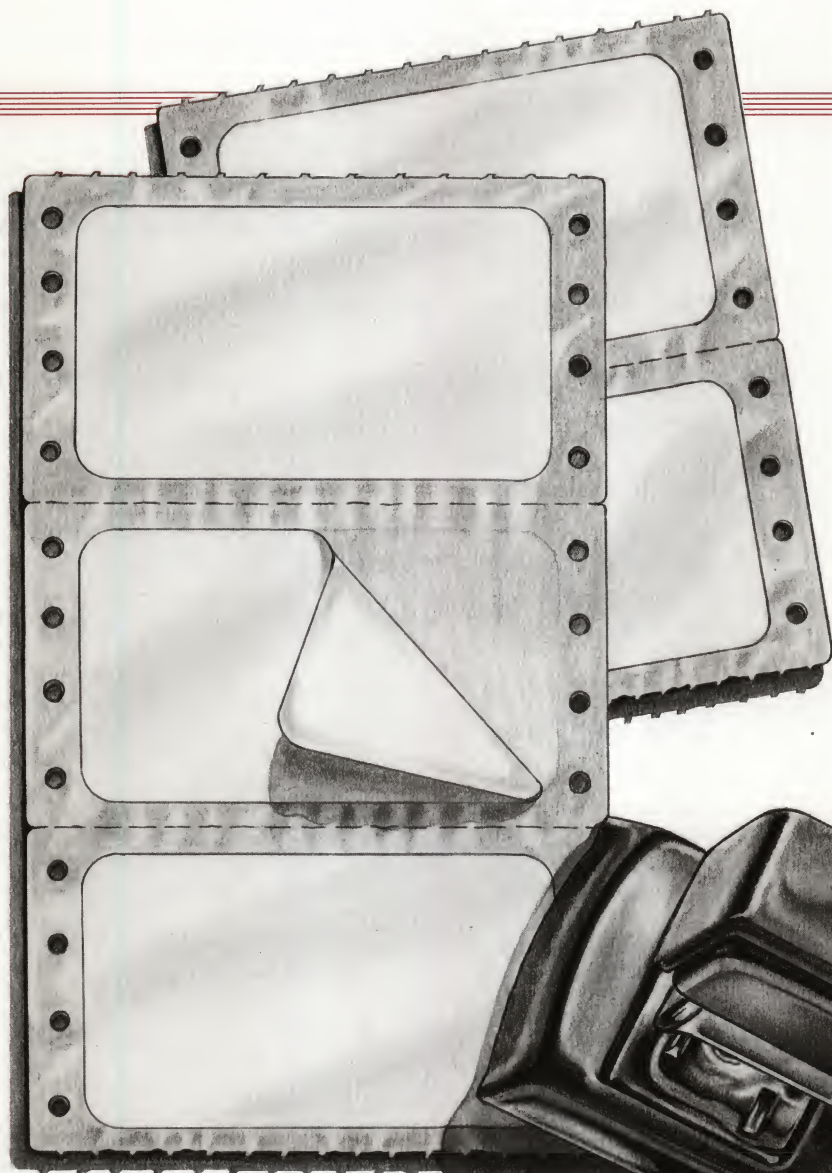
to Microsoft® File—the information manager.

Microsoft File stores, retrieves, processes, and reports information for you. You just decide what kind of information you want to manage and how you want to organize it. File does the rest.

File meets the needs of the student who wants to keep an address list and a record of school expenses. File meets the needs of the business person who wants to keep track of inventory, client billing, and invoice mailing.

File is for anyone who wants to organize and find information quickly and easily.





About This Manual

This manual explains how to use File. Before you start, you should already know how to perform basic operations with your Apple® Macintosh™. You should know how to use the mouse, manipulate windows, scroll, pull down menus, and choose commands.

Before You Begin introduces some basics about filing systems in general and Microsoft File in particular.

Getting Started explains what you need to use File and how to start File.

Learning File teaches you how to create a basic datafile—an address book. Then you will experiment with a datafile that is provided on your disk to learn about finding and sorting information.

Using File covers specific filing tasks. Each chapter in “Using File” explains the task and how to perform it. Examples under the heading “Now Try This” illustrate a practical use for each task. You can read the examples to understand the concepts presented, or you can work through the examples on your Macintosh.

File Reference contains a directory of all File commands arranged in the order they appear on the pull-down menus. This section also explains the dialog boxes you’ll see as you use the commands.

Your experience with computer filing systems will determine how you use this manual and which parts you refer to most often. For example, if you have worked with filing systems before, you may need to read only the procedures in “Using File” before you are doing useful work with File.

The facing page is a guide to the chapters and sections that will help you most.

If you want to . . .

Start with the basics and learn about computer filing systems

Add information to a datafile that has already been created

Learn how to move around in a datafile and edit records

Create a basic datafile

Create more complex datafiles with different types of information such as numbers and dates

Get a quick overview of some of File's features

Perform a specific task

Learn about a command

Then . . .

Read "Before You Begin" and "Learning File." You can also complete the examples in "Using File."

Read "Add Information to the Datafile" in Chapter 1, "Create a Datafile."

Read Chapter 4, "Editing Datafiles."

Read Chapter 1, "Create a Datafile."

Read Chapter 3, "Creating a Datafile." You may also want to complete the examples.

Read "Learning File."

Find the chapter in "Using File" that describes the task you are performing, and read the procedures.

Find the command and read about it in "File Reference."

Before You Begin

Before you begin learning File, you should know some basics about computer filing systems and how they store information. After you understand the basics, you will learn about File and the difference between datafiles (where information is stored) and forms (how information looks).

In this section you will learn about:

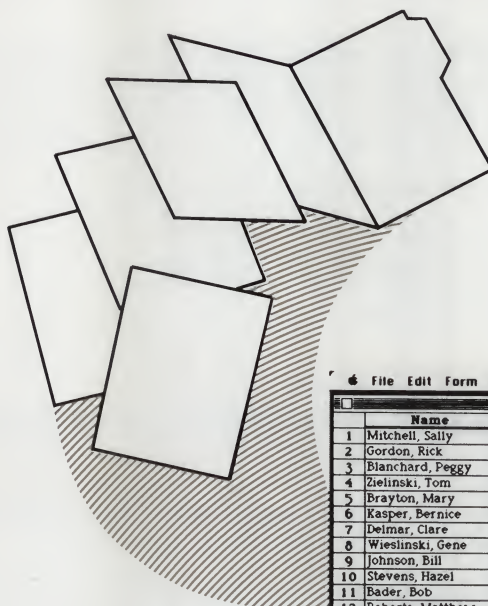
- Filing systems in general.
- Datafiles and forms in File.
- List Helper.

What Is a Filing System?

A computer filing system is like a paper filing system: both help you keep track of information.

With any filing system, you need to store information, search through the information to find something, sort the information in a particular order, and perhaps prepare reports from the information.

The datafiles you create with File are like the manila file folders you store in a filing cabinet. Inside the folders you find information that relates to some topic: an inventory list, sales figures, phone numbers, addresses....



File Edit Form Organize

Personnel File

	Name	Address	City	State	
1	Mitchell, Sally	3356 Trottnr Ave	Seattle	WA	96
2	Gordon, Rick	124 Storybrook Ln	Bellevue	WA	92
3	Blanchard, Peggy	223 Main St	Seattle	WA	96
4	Zielinski, Tom	4467 Hayster Rd #376	Seattle	WA	92
5	Brayton, Mary	3098 Pleasant Ridge	Seattle	WA	96
6	Kasper, Bernice	1754 Hudson St	Kirkland	WA	96
7	Delmar, Clare	6927 Norton Ave	Seattle	WA	96
8	Wieslinski, Gene	1009 Pine Ridge Ct	Seattle	WA	92
9	Johnson, Bill	Route 1	Kirkland	WA	96
10	Stevens, Hazel	2470 Eastlane Rd	Seattle	WA	96
11	Bader, Bob	7171 Northbridge Ln	Seattle	WA	96
12	Roberts, Matthew	3092 S W 56 th Place	Bellevue	WA	92
13	Fishbein, Andrew	9789 Sunrise Ave	Kirkland	WA	96
14	Palmer, Steve	5534 NE Cranston	Seattle	WA	96
New					

14/14

The records in a datafile are like the papers you keep in each file folder.

File Edit Form Organize

	Name	Address	City	State
1	Mitchell, Sally	3358 Trottnr Ave	Seattle	WA 98
2	Gordon, Rick	124 Storybrook Ln	Bellevue	WA 98
3	Blanchard, Peggy	223 Main St	Seattle	WA 98
4	Zielinski, Tom	4467 Hayster Rd #376	Seattle	WA 98
5	Brayton, Mary	3096 Pleasant Ridge	Seattle	WA 98
6	Kasper, Bernice	1754 Hudson St	Kirkland	WA 98
7	Delmar, Clare	6927 Norton Ave	Seattle	WA 98
8	Wieslinski, Gene	1009 Pine Ridge Ct	Seattle	WA 98
9	Johnson, Bill	Route 1	Kirkland	WA 98
10	Stevens, Hazel	2470 Eastlane Rd	Seattle	WA 98
11	Bader, Bob	7171 Northbridge Ln	Seattle	WA 98
12	Roberts, Matthew	3092 S W 56 th Place	Bellevue	WA 98
13	Fishbein, Andrew	9789 Sunrise Ave	Kirkland	WA 98
14	Palmer, Steve	5534 NE Cranston	Seattle	WA 98

New

14/14

Each piece of information on a piece of paper (for example, someone's name) is called a field.

	Name	Address	City	State
1	Mitchell, Sally	3358 Trottnr Ave	Seattle	WA
2	Gordon, Rick	124 Storybrook Ln	Bellevue	WA
3	Blanchard, Peggy	223 Main St	Seattle	WA
4	Zielinski, Tom	4467 Hayster Rd #376	Seattle	WA
5	Brayton, Mary	3096 Pleasant Ridge	Seattle	WA

What Are Datafiles and Forms?

Microsoft File presents a datafile in a window:

Record numbers

	Employee codes		
1	001213	Thompson	Celia
2	002893	Johnson	Bill
3	002006	Markum	Timothy
4	001459	Pennimore	Susan
5	001090	Swanson	Irene
6	002303	Abrams	Stanley
7	001598	Renster	Anne
New			
7/7			

Records

Add a new record here.

Total number of records in datafile

Number of records in window

Before you add information like names, addresses, and phone numbers to your datafile, you have to set up a form to structure the information.

A form in File is like any paper form. It determines how the information will look and what kind of information will go into the datafile.

You create a form for your datafile in a separate window called the form window:

1	001213	Thompson	Celia
2	002893	Johnson	Bill
3	002006	Markum	Timothy
4	001459	Pennimore	Susan

code	last name	first name

Fields in the form are placeholders for the information in the datafile.

The form window is like a blank form. Each record in the datafile window is like a filled-in form.

Form A/S1

Name: _____

Address: _____

Title: _____ Start Date: _____

Office Ext.: _____ Home Phone: _____

In case of Emergency: _____

Blank form

Form

0 Name: Name

Address: Street

City State

Zip

1

2 Title: Title Start Date: Start Date

Office Ext.: Office Ext.: Home Phone: Home Phone

3 In Case of Emergency: emerg.name

address

address2

View 1

Name: Mitchell Sally

Address: 3358 Trollner Ave.
Seattle WA 98199

Title: Account Exec. Start Date: 12/12/84

Office Ext.: _____ Home Phone: _____

In case of Emergency: _____

Name: Gordon Rick

Address: 124 Storybrook Ln.
Bellevue WA 98017

Title: Industrial Eng. Start Date: 3/7/82

Office Ext.: _____ Home Phone: _____

In case of Emergency: _____

Name: Blanchard Peggy

Address: 223 Main St.
Seattle WA 98340

Title: Admin. Asst. Start Date: 5/8/83

Office Ext.: _____ Home Phone: _____

In case of Emergency: _____

Filled-in form

Personnel File

1 Name: Mitchell, Sally

Address: 3358 Trollner Ave.
Seattle WA 98199

Title: Account Executive Start Date: 12/12/84

Office Ext.: _____ Home Phone: _____

2 Name: Gordon, Rick

Address: 124 Storybrook Ln.
Bellevue WA 98017

Title: Industrial Engineer Start Date: 3/7/82

Office Ext.: _____ Home Phone: _____

3 Name: Blanchard, Peggy

Address: 223 Main St.
Seattle WA 98340

Title: Administrative Assistant Start Date: 5/8/83

Office Ext.: _____ Home Phone: _____

In Case of Emergency: _____

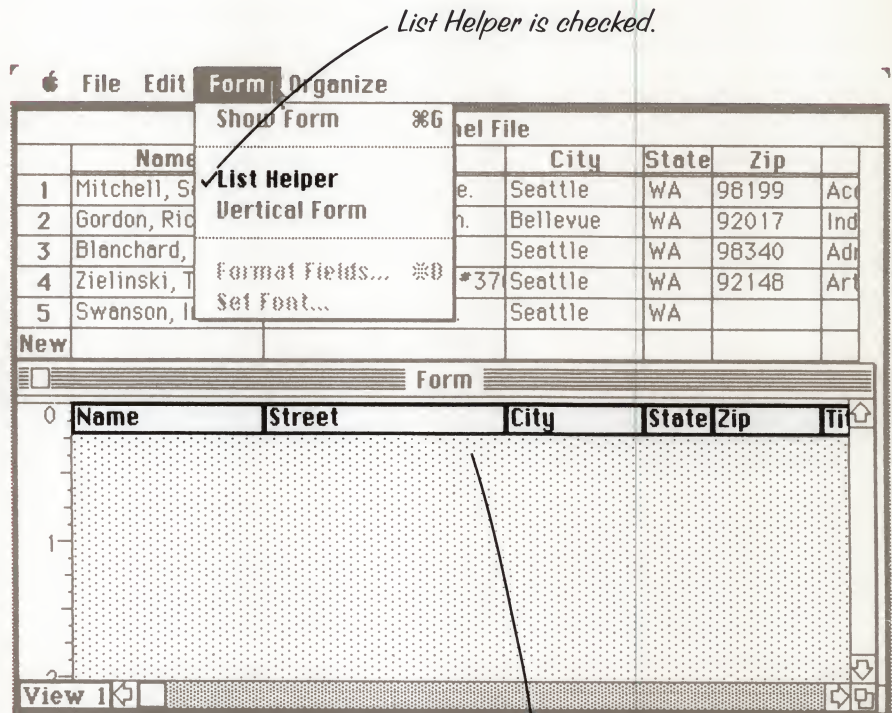
5/5

The datafile's form also describes the types of information kept there. Later, you will learn more about the four types of information stored by File—text, numbers, dates, and pictures.

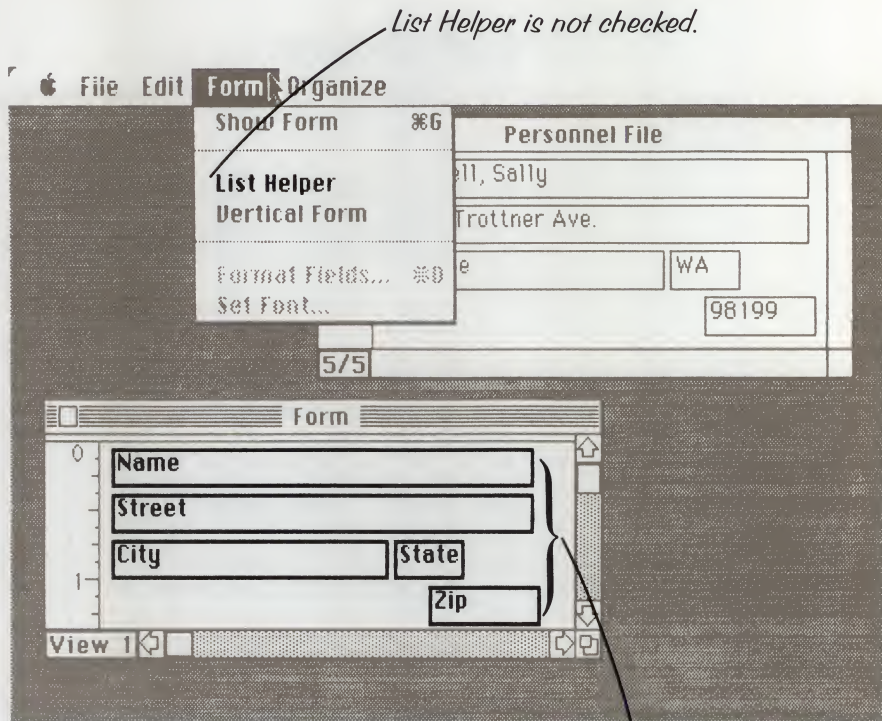
List Helper— To Make Your Job Easier

11

When you create a new datafile, a feature called List Helper arranges your information in columns so you can view more records at once. List Helper is working for you if it is checked on the Form menu.



When List Helper is not checked, you can create forms for your datafile that look more like paper forms you use. You can arrange the fields in any format and can have separate boxes to hold information.



Before you start creating complex forms, you will learn how to create basic forms with List Helper.

When you are ready to create more complex forms, uncheck List Helper by choosing it from the Form menu. Then, read "Working Without List Helper" in Chapter 6, "Designing Forms."

Getting Started

To use File you need:

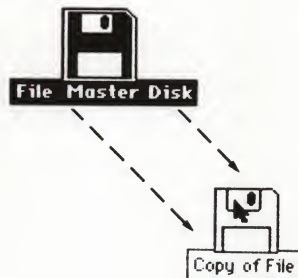
- A Macintosh computer
- The File master disk
- A copy of the master disk
- Extra disks for datafiles
- A printer (optional)
- A second disk drive (optional)

Copying File

Microsoft File is provided on a master disk. This disk contains special identification that Macintosh must read when you use File.

You can make as many copies of File as you want and then put your master disk away to protect it from accidental damage. But Macintosh must read the identification from the master disk the first time you start File after turning your computer on. Then you can use your copies to start File.

Make a copy of the master:



Note Keep your File master disk in a safe place to protect it from accidental damage. To obtain a backup copy of the master disk, follow the instructions on your backup order card.

Starting File

Start File with your copy:

Always start File with one of the copies you made. Macintosh will ask for the master disk when it needs to read the identification.

- 1 Turn on your Macintosh.
- 2 Insert your copy of the File disk into the disk drive.

To:

Start File and create
a new datafile

Double-click on:



Start File and open
an existing datafile



Then, follow the instructions on your screen for inserting the master disk and reinserting your copy.

If you inserted the master disk:

If you inserted the master disk first, you can still use your copy for your work:

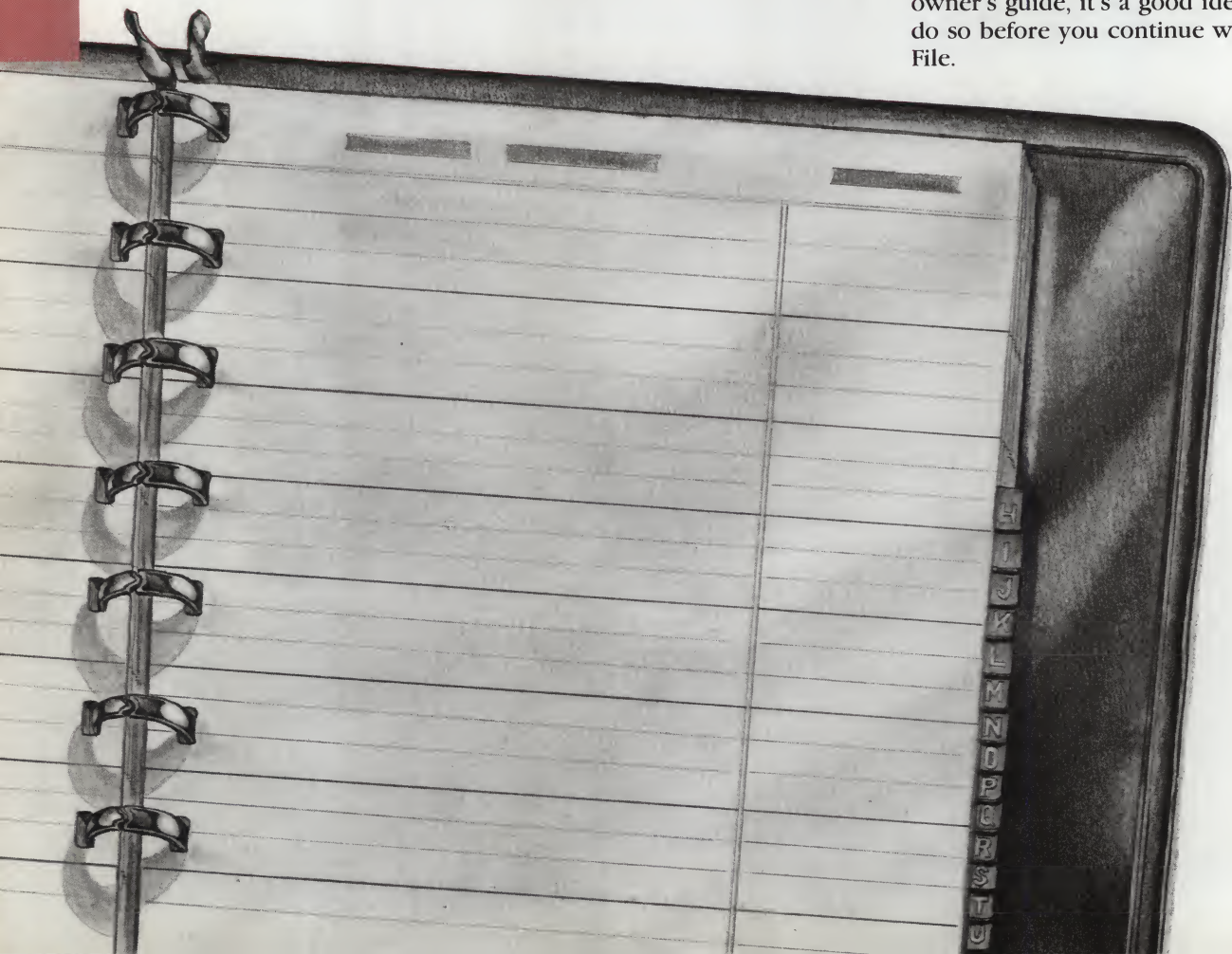
- 1 Double-click to start File.
- 2 Choose the Quit command from the File menu.
- 3 Choose the Eject command from the File menu.
- 4 Insert your copy of the File disk.
- 5 Start working with File.

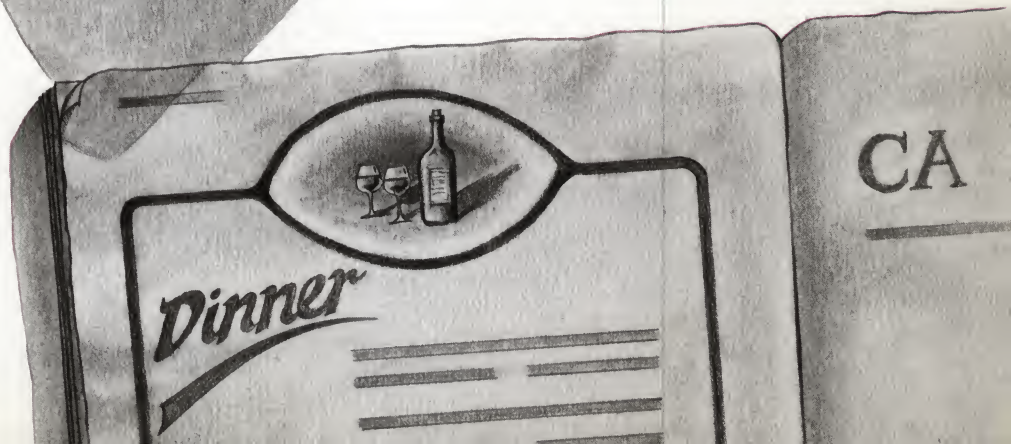
Learning File

In "Learning File" you will create a datafile that keeps track of your addresses and phone numbers (Address Book), and then use a datafile that has been provided for you on disk (Good Restaurants).

Before you use File, read "Before You Begin" to learn about the

basics of File and of computer filing systems. You should also know how to perform basic operations with your Macintosh. At the end of this section, you can read "Using the Mouse With File" to refresh your memory about the basics and to get an overview of the techniques you use most often in File. If you have not read *Macintosh*, your owner's guide, it's a good idea to do so before you continue with File.







1 Create a Datafile

In this chapter, you will learn how to start File and how to create a datafile. After you create the datafile called Address Book, you can use it to keep track of your friends' or business associates' names, addresses, and phone numbers.

Start File and Create a Datafile

If you have not yet made a copy of the File master disk, read and follow the instructions in "Getting Started."

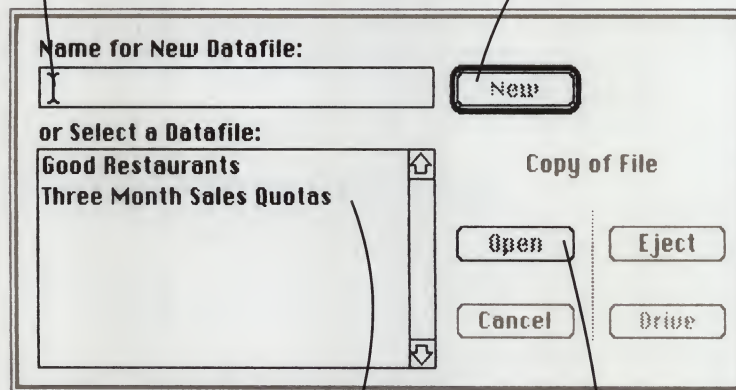
- 1 Switch the Macintosh on if it's not already on.
- 2 Put your copy of the File disk into the disk drive.
- 3 Double-click on the File application icon.

Macintosh may ask you to insert the master disk so it can read the identification. Insert the master disk. After reading the identification, Macintosh will ask you to reinsert your copy.

When you start File, you either create a new datafile or open an existing datafile.

*To create a datafile,
type a name here . . .*

*. . . and click the New button
or press the Enter key.*



*To open an existing datafile,
select a name . . .*

. . . and click the Open button.

Note

Microsoft File works a little differently from other Macintosh applications you may have used. File asks for a name when you create a new datafile because File saves your information on the disk as you enter it into the datafile.

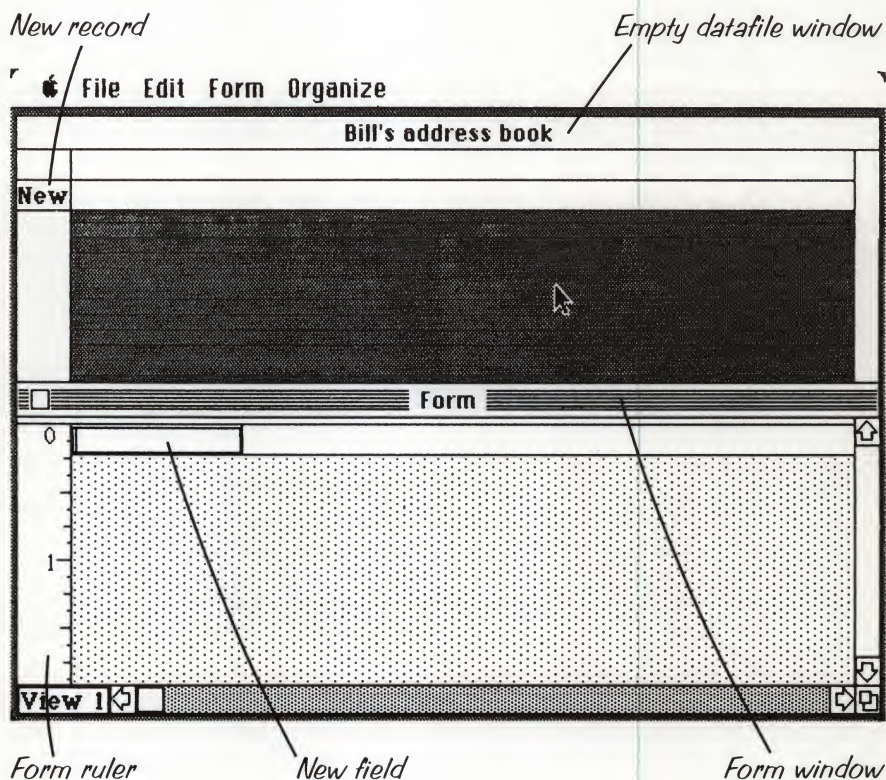
You do not have to use the Save command to save your datafiles.

Now you can create the Address Book datafile. The insertion point is blinking at the top box, waiting for you to type a name.

Name the datafile:

- 1 Type your name, followed by 's address book. For example, type *Bill's address book*. The box will scroll if you type a long name.
- 2 Click the New button or press the Enter key.

After you give the datafile a name, File displays:



Before you can add information to a datafile, you need to create the blank form. That's why the form window is in front. The ruler on the left helps you design a form with measurements like paper forms you use.

Creating a form is easy. First you type the field names. Each field indicates a place for a piece of information. For now, don't worry about sizes of the fields.

Notice the blinking insertion point in the New field in the form window. As soon as you begin to type a word as the name of the first field of the datafile, the New field moves to the right.

If you make a mistake as you type, press the Backspace key and retype. After you type the field name, press the Return key (or the Tab key) to move to the New field.

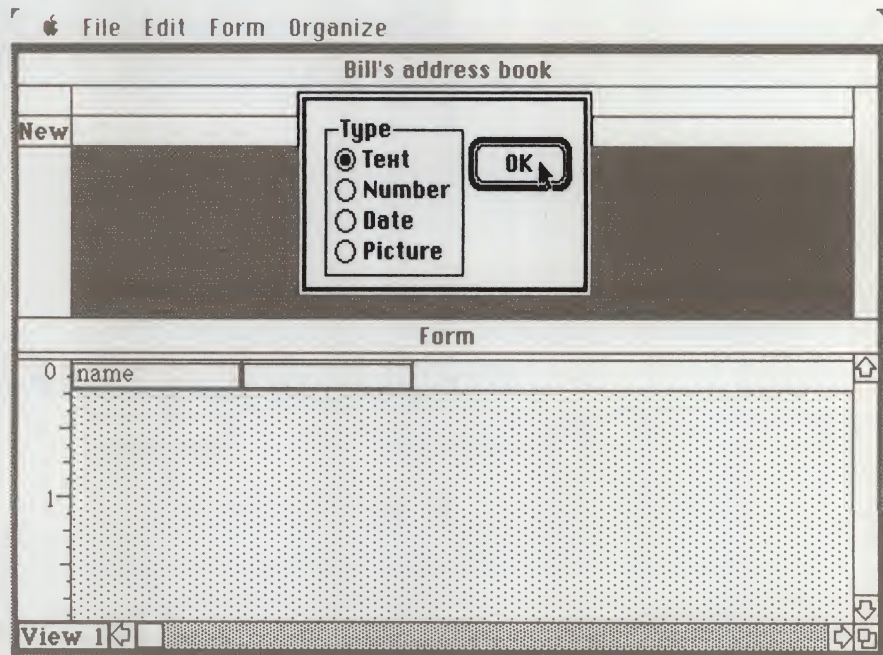
After you type a field name and press the Return key, File displays a list of information types for that field. An information type describes the kind of information you can store in that field. Will it be text, a number, a date, or a picture?

The type of information is important later when you want to enter, find, and sort information. You can learn more about information types in Chapter 3, "Creating Datafiles."

Create the form:

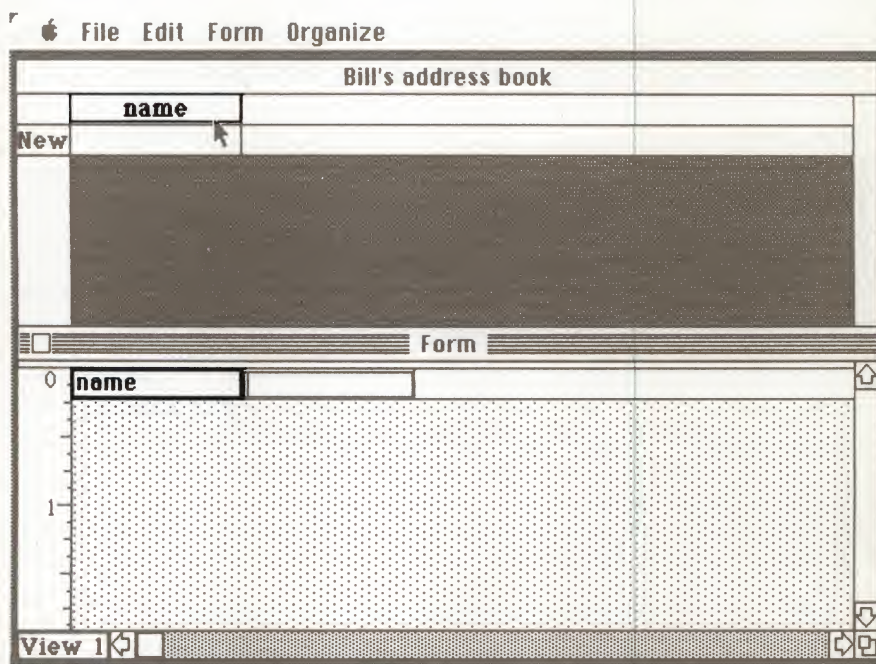
- 1 Type *name* and press the Return key.

File asks you to define the information type. Notice that *Text* is already chosen.



- 2 Press the Return key or click the OK button.

You confirm that the "name" field will contain text. The word "name" becomes bold and appears as a column heading in the datafile window.



- 3 Type *address* and press the Return key twice.

- 4 Type *phone* and press the Return key twice.

When you want a field to contain text, you can press the Return key twice after typing the field name, instead of pressing the Return key and then clicking the OK button.

File creates the "phone" field as a Text field.

Make the “birthday” field a Date field:

In addition to names, addresses, and phone numbers, you may want to keep track of people's birthdays. You can create a field for birthdays and specify that it will store only dates.


- 1 Type *birthday* and press the Return key once.
- 2 Choose *Date* as the information type.
- 3 Click the OK button.

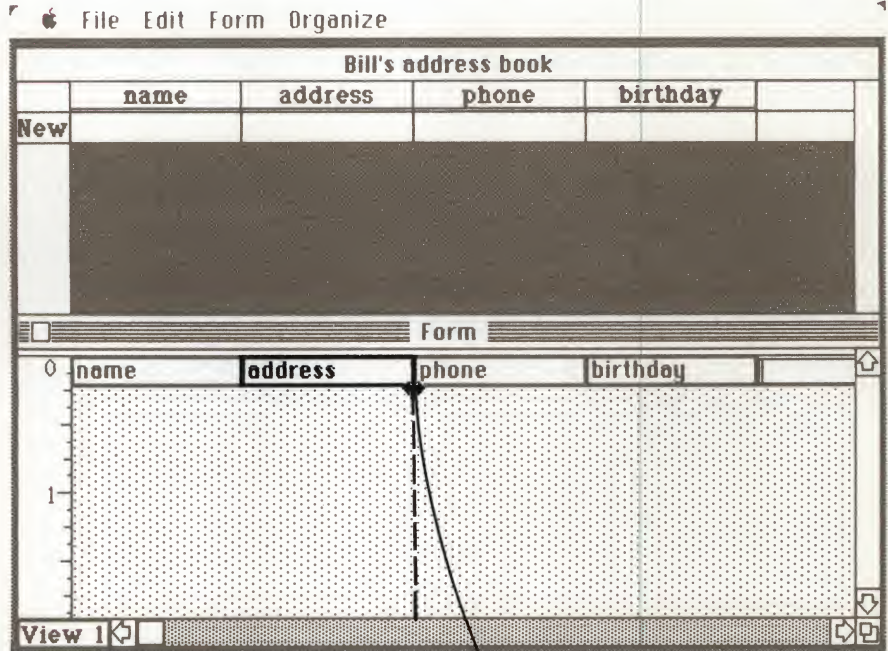
You have created four fields for your Address Book form. These fields are the placeholders for the information you add to the datafile later.

Because you are creating a new datafile, a feature called List Helper is at work. If you pull down the Form menu, you see that List Helper is checked. List Helper keeps your information in a column format. The field names you just created in the form window appear as column headings in the datafile window.

When you add fields to a form, they are all the same size. If you need to enter more information than a field can display, you can widen the field. With List Helper, you can drag the lines between fields either in the form window or in the column heading of the datafile window. In this exercise, you will work in both the form and the datafile windows.

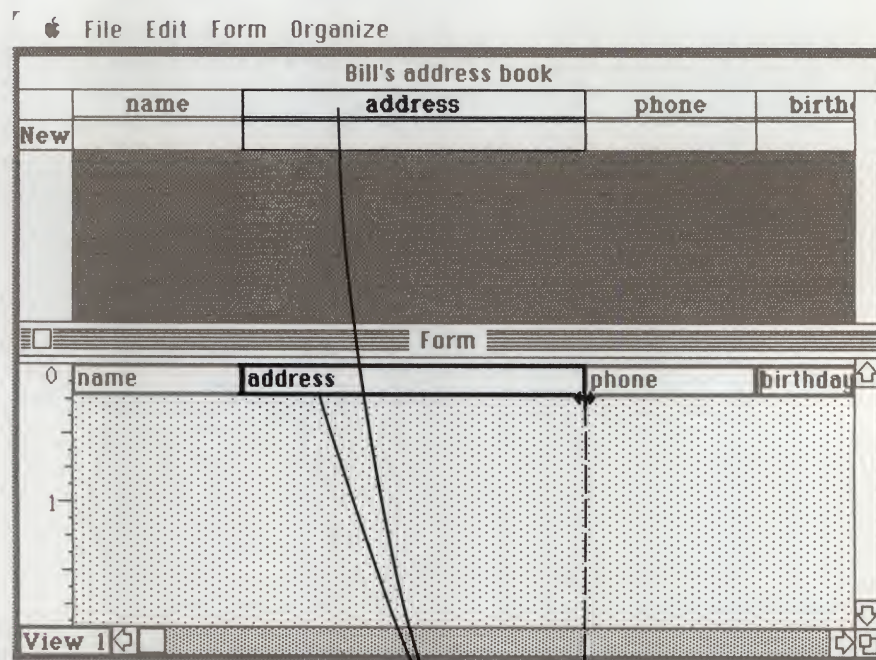
**Make the
"address" field
wider:**

- 1 In the form window, move the pointer to the line between the "address" and "phone" fields.
- 2 When the pointer changes shape (), drag to the right until the dotted line passes the line between "phone" and "birthday."



Drag the line to the right to make the "address" column wider.

The columns to the right of the “address” field move over to make room. When you make a change in the form window, all the columns in the datafile window also change. The “address” field is now wider than the other fields.




The address column is wider in the form window and in the datafile window.

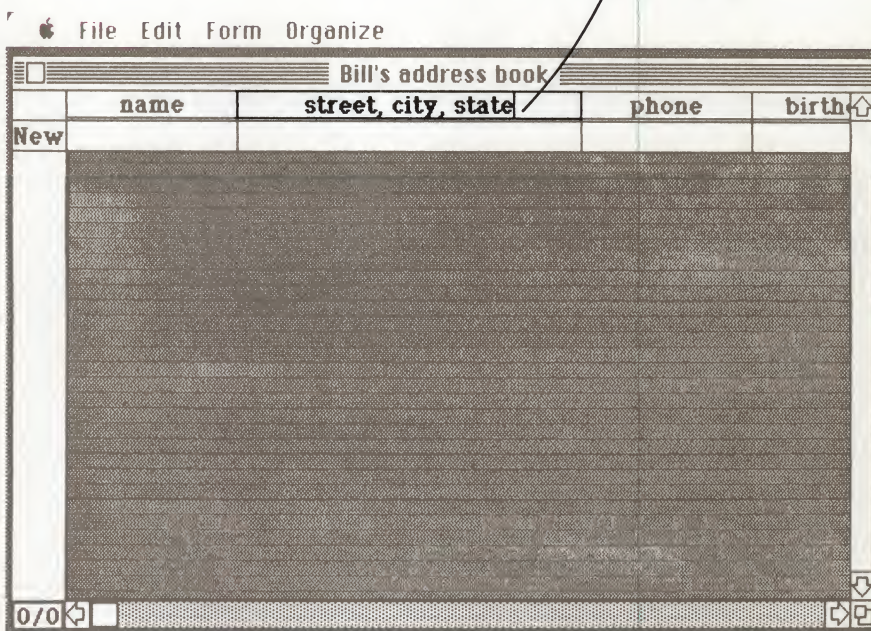
If you want more than one line of text within fields or if you want to make more room for a picture field, you can make all the fields taller with List Helper by dragging the bottom line down. For more information about forms and List Helper, see “Working With List Helper” in Chapter 6, “Designing Forms.”

Edit the heading:

Earlier, you learned that when you type a field name it appears as a heading in the datafile window. You may not always want the heading to be the same as the field names. You can change the heading by editing it in the datafile window.

- 1 Make the datafile window active by clicking in it.
- 2 Point to the “address” heading. When the pointer changes shape (), select the word “address” by dragging over it.
- 3 Type *street, city, state*

*You can edit headings
in the datafile window.*



The heading for the field in the datafile window should read “street, city, state,” while the field name in the form window is still “address.”

You can learn more about the difference between headings and field names in Chapter 6, “Designing Forms.”

Add Information to the Datafile

In the last section, you learned how to name a datafile, create a form for the datafile, widen a column, and edit the heading in the datafile window. You did most of your work in the form window.

You now have an Address Book datafile ready to store your information. In this lesson, you will put names and addresses into your address book in the datafile window.

You add information in the New record, which is always the last record in a datafile. In a new datafile, the New record is the only record in the datafile and is at the top of the window. In larger datafiles, you may have to scroll to the end of the list of records to find the New record.

Typing and editing information in the datafile window is similar to typing and editing in other applications for Macintosh. You use commands from the Edit menu to cut, copy, and paste. If you make a mistake, you can always use the Undo command.

Add your name to the datafile:

- 1 Click in the datafile window in the New record under "name."
- 2 Type your name and press the Return key to move to the next field. As soon as you type, another New record appears and the record you are typing in is numbered "1."

If you type to the end of a field, the field scrolls as you type. When you press the Return key, the field displays the first characters you typed. You can scroll within a field by dragging to the right or left.

Continue typing and pressing the Return key after each field until you have filled in your address and phone number. Stop before you type your birthday.

*Select an insertion point
and type.*

*Press the Return key to move to
the next field.*

	name	street, city, state	phone	birthday
1	Bill			
New				

Watch the “birthday” field:

Do you remember choosing *Date* as the information type when you created the “birthday” field? Before you type your birthday, it is important to know that, in a Date field, File converts any date you type to a medium format. If you type 9/9/59, for example, File changes it to “Sep 9, 1959.” Later, you can change dates to display in either short or long formats. You can read more about how File displays dates in Chapter 3, “Creating Datafiles.”

- 1 Type your birthday in short format (for example, 9/9/59).
- 2 Press the Return key.
- 3 Watch as File converts the date and displays it in medium format.

When you press the Return key after the “birthday” field, the insertion point moves down to the “name” field in the New record. Now, you can continue adding names and addresses to your datafile. See Chapter 3, “Creating Datafiles,” if you want more information about moving from field to field.

If you need help while you are using File:

- 1 Choose the About Microsoft File command from the Apple menu. File displays a list box with the topics available.
- 2 Select a topic from the list.
- 3 Click the Help button. File displays a window with the information you requested.
- 4 Click the Next button to see the next topic, or the Topics button to return to the list of topics.

You can also get help by pressing Command-? whenever you need information. Your pointer changes shape (?). Move this question mark pointer to the area of the window, the option in a dialog box, or the command you want help on. Click in the window or dialog box, or choose the command and File displays the help information. Press Command-? again to get information about the help information itself. To return to your work, press the Cancel button in the help window.

If you ever need help:

What you just did:

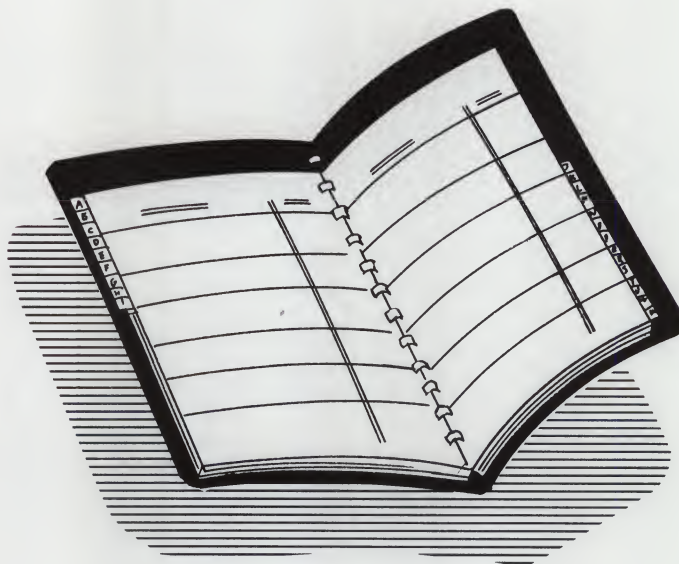
You created a datafile to keep track of names, addresses, phone numbers, and birthdays.

- First, you gave the datafile a name.
- Then you created its form in the form window by typing, pressing the Return key, and choosing an information type.
- Then you changed the appearance of the datafile by changing field sizes in the form window, and the heading in the datafile window.
- Then you added information about yourself (one record) to the Address Book datafile. You learned how to type and move in the datafile window. You learned how File displays dates.

In Chapter 2, you will learn about finding and sorting information, while using a larger datafile that is already on your disk.

After you learn about finding and sorting, you might want to use your address book to:

- Order the records alphabetically by name.
- Order the records from youngest friend to oldest.
- Quickly find a friend's phone number.
- Find the birthdays in a particular month so you can send those people cards.
- Find everyone who lives near you.
- Find everyone who is over a certain age.



**If you want
to take a break:**

If you want a break before starting the next lesson, put your address book away.

- Choose the Quit command from the File menu.

When you quit the first time after creating a datafile, File automatically saves the form along with the datafile.

Important You do not have to save datafiles before you quit File. File saves information on your disk under the name you gave the datafile when you first created it. However, you should always choose the Quit command to exit File before you turn Macintosh off to ensure that you don't lose any information.

2 Organize and Edit a Datafile

In Chapter 1, you learned how to create a datafile and how to put information in it. In this chapter you will experiment with a datafile called Good Restaurants, which contains information about restaurants in various cities. You will use the Good Restaurants datafile to learn how to:

- Open an existing datafile.
- Find information.
- Sort information.
- Change the appearance of a form.
- Print a datafile.

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Open a Datafile

If you quit File after you created the Address Book datafile, open the Good Restaurants datafile from the Finder™:

- Double-click on

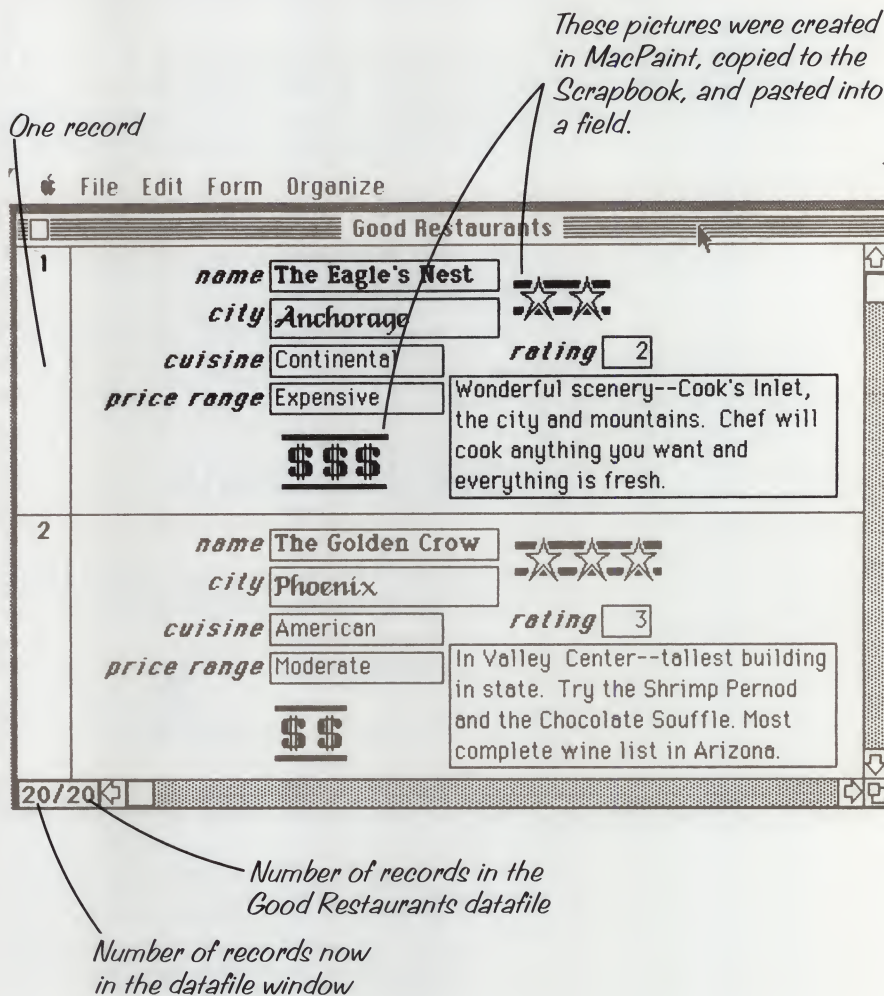


Good Restaurants

If the Address Book datafile is still on your screen:

- 1 Click in the datafile window to make sure it is active.
- 2 Choose the Open Datafile command from the File menu.
- 3 Select “Good Restaurants” in the list box.
- 4 Click the Open button.

The Good Restaurants datafile contains information about restaurants in various cities: the type of food they serve, the price range, a quality rating, and pictures that accompany the price range and rating fields.



File shows the datafile in a window. As with any Macintosh window, you can scroll to see more information, drag the size box to change the window size, and drag the title bar to move the window.

The text at the left of the fields indicates the contents of each field in the datafile: name, city, cuisine, price range, and rating.

If you completed the lessons for creating an address book, you will notice that the form for the Good Restaurants datafile does not have information presented in columns. A datafile can look like this when List Helper is not checked on the Form menu. You will learn more about the form for the Good Restaurants datafile later in this chapter.

The Good Restaurants datafile contains information about 20 restaurants. Each of these 20 records is in the datafile window, but you have to scroll to see all of them. The bottom left of the datafile window displays the numbers “20/20.” The first number indicates how many records are in the window, the second how many are in the datafile.

If you scroll, you’ll notice that the records aren’t in any particular order. With File, it doesn’t matter what order your records are in. You can still find what you need quickly.

In your own datafiles, for example, you might need a list of all clients who owe more than \$50.00, or of all products that are back-ordered. Or maybe you need to know which books in your bibliography contain information on deep-sea diving for your term paper on treasure hunting. You can also find out which books are due back at the library.

Find the restaurants in St. Louis:

If you travel to St. Louis, you can use the Good Restaurants datafile to find out about the good restaurants there. As long as the information is in the datafile, File can find it.

- 1 Choose the Find command from the Organize menu.
- 2 Click the Clear button.
- 3 Click in the box next to “city.”
- 4 Type *St. Louis*
- 5 Click the Find button or press the Enter key.

A window that looks like the form appears. This is the find window, where you specify what you want to find.

Now you can be sure the find window has no other information in it—in case someone worked through “Learning File” before you did.

As File looks for the records, a message appears at the bottom of your screen, telling you how many records match what you typed. As the records are found, File puts them in the datafile window.

File Edit Form Organize

Good Restaurants

1

name

The Eagle's Nest

city

Anchorage

cuisine

Continental

rating

2

Find

Find

Clear

2

name

city

cuisine

rating

cuisine

American

price range

Moderate

\$\$

In Valley Center--tallest building in state. Try the Shrimp Pernod and the Chocolate Souffle. Most complete wine list in Arizona.

20/20

Find window

Type the information you want to find in the appropriate fields.

The datafile window now contains only the records for the restaurants in St. Louis. At the bottom of the window the indicator reads "4/20," meaning that, out of 20 records in the datafile, four records are in the datafile window.

The screenshot shows a window titled "Good Restaurants" with a menu bar (File, Edit, Form, Organize). It displays two records in a list:

Record Number	name	city	cuisine	price range	rating	Description
1	Al Carter's	St. Louis	Italian	Expensive (\$\$\$)	3 stars	The tamarind-dressed salad is a tradition here. Wide variety of pastas served. Top it all off with one of the home-made desserts.
2	Henry VII Restaur	St. Louis	English	Moderate (\$\$)	2 stars	Delicious home-baked bread is served with your beef Wellington, Yorkshire pudding or other such solid fare. Suitable wine list.

At the bottom left of the window, the indicator shows "4/20".

The Good Restaurants datafile has a total of 20 records.

There are four records in the datafile window (only two are showing).

Many times, after finding information, only some of the records from a datafile are displayed in the datafile window. Anytime you want to see all the records in your datafile, you can choose the Show All Records command from the Organize menu. However, don't do it now.

Now that you've found the four restaurants that are in St. Louis, search through the datafile to find those that serve Italian food.

- 1 Choose the Find command from the Organize menu.

Notice that the find information you just typed ("St. Louis") is still in the find window. Since you want to find the Italian restaurants in St. Louis (not all the Italian restaurants), you can leave that find information as it is. Each time you choose the Find command, File searches the entire datafile.

- 2 Click in the box next to "cuisine."
- 3 Type *Italian*
- 4 Click the Find button.

Which restaurants in St. Louis serve Italian food? They should be the only records displayed now in the datafile window. (There are two.)

Instead of specifying exactly what you want File to find, you can also specify limits you want File to work within. For example you might want to find all the restaurants with a rating higher than two. You would type a symbol called an operator, followed by the information you want to find: > 2, that is, greater than 2.

You will learn about operators in Chapter 5, "Organizing Datafiles."

Now that you know where to dine in St. Louis, bring all the records back to the screen.

- Choose the Show All Records command from the Organize menu.

Now all 20 records from the Good Restaurants datafile are in the datafile window.

The records in the datafile window are in no particular order until you sort them. When you sort the records in the datafile window, you arrange them in some kind of order by grouping similar kinds of information.

Display all the records again:

Sort the restaurants by cuisine:

Depending upon the type of information you store in your datafiles, you can sort records alphabetically, chronologically, or numerically. Perhaps you want to sort the restaurants by cuisine. File will group all restaurants with the same type of food: American, Italian, Mexican, and so on.

- 1 Choose the Sort command from the Organize menu.
- 2 Move the pointer to the box next to "cuisine" and click.
- 3 Click the Sort button or press the Enter key.

A window that looks like the form appears. In this window, you specify how File should sort the datafile.

The "1" that appears tells File to sort first by this field, and the "A->Z" tells File to order records alphabetically in ascending order.

The screenshot shows a window titled "Good Restaurants" with a menu bar (File, Edit, Form, Organize) and a status bar (20/20). The main area contains a table with columns: name, city, cuisine, price range, and rating. The first row is "The Eagle's Nest" in Anchorage, Continental cuisine, Expensive price range, with a rating of 2 stars. A "Sort" dialog box is open, showing the same columns. The "cuisine" column is selected with a "1" and "A->Z" indicating the sort order. The "Sort" button is highlighted. The "Clear" button is also visible. A text box at the bottom right of the dialog box says "and the Chocolate Souffle. Most complete wine list in Arizona."

File orders the records from A to Z.

File sorts first by this field.

While File sorts the datafile, a status message appears at the bottom of your screen. After File orders the records, your datafile window should have all the American restaurants listed first, then the Continental, then the Italian, and so on.

Note that File only sorts the records contained in the datafile window. If you did not choose the Show All Records command after finding the restaurants in St. Louis, File would sort only the Italian restaurants in St. Louis. Your records remain sorted only until you choose another command that affects how many records are in the window.

Change the Form

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Look at the form window:


Move the “stars” field:

Before information was entered into this datafile, someone decided what kind of information to put into it, how it should be organized, and how it should look.

You design a datafile in the form window. If you worked the exercises in Chapter 1, you started out by creating fields in the form window.

- 1 Point to the Form menu and hold down the mouse button. Notice that List Helper is not checked.
- 2 Choose the Show Form command from the Form menu.

Without List Helper, each field in the form acts like a separate box. You can move each box around, change its size, and hide field boxes or heading boxes you don't want visible in the datafile window.

You can pick up a field and move it around when the pointer () is over the box. Move the “stars” field so you'll have more room later to expand the “name” field.

- 1 Move the pointer over the “stars” field.
- 2 Drag the field down and to the left until the outline of the “stars” field is next to and overlapping the “price range picture” field.

The "stars" field overlaps the "price range picture" field.


The screenshot shows a window titled "Good Restaurants" with a menu bar (File, Edit, Form, Organize). The form contains several fields: "name" (The Golden Crow), "city" (Phoenix), "cuisine" (American), "price range" (Moderate), "rating" (3), and "comments" (In Valley Center--tallest building in state. Try the Shrimp Pernod and the Chocolate Souffle. Most...). A "stars" field is shown overlapping the "price range picture" field. A dashed box highlights the "rating" and "comments" fields. A pointer indicates the "stars" field overlapping the "price range picture" field.

You move fields by dragging them.

Expand a field:

Sometimes, a field may not be large enough to let you see all the information it contains. If List Helper were checked, you would move the line between fields to make more room for each column. Now, however, you are changing the form without List Helper. Each field is like a separate box.

Size the "name" field so you can see the full name of all the restaurants:

- 1 Move the pointer to the right side of the "name" field.
- 2 When the pointer changes shape (), drag to the right about one-half inch.


Now, hide a field:

In the form window, the large dotted area below all the fields is the hide area. You can drag fields into this area if you don't want their contents visible in the datafile window.

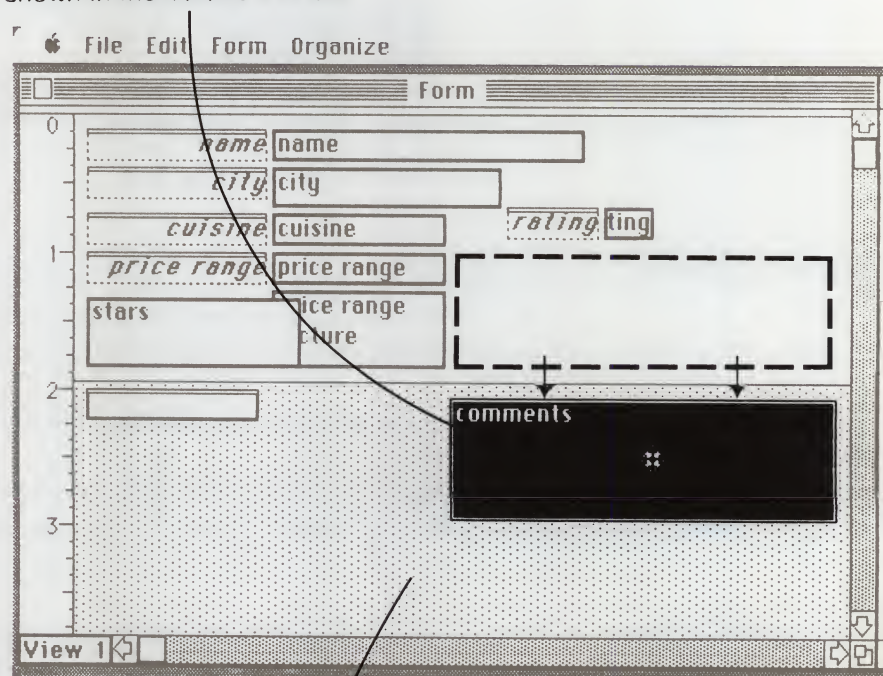
When you are working with a large form, you may have to scroll or make the window larger to see the hide area. Before you hide a field, expand the form window to take up the whole screen. Expanding a window is handy when you want to work exclusively in that window.

- Double-click in the title bar of the form window.

Now, drag the “comments” field into the hide area. When you look at the datafile again, none of the comments about the individual restaurants will appear in the datafile window.

- 1 Point to the “comments” field.
- 2 When the pointer changes shape (), drag the field down into the hide area.

When a field is in the hide area of the form, its contents are not shown in the datafile window.




Hide area

Now, close the form window so you can see the datafile.

- Click in the close box of the form window.

Notice that all the information from the “comments” field in the datafile disappears. Information in fields that you place in the hide area is not deleted from the datafile; it is just hidden from view.

You can also move the line above the hide area—the hide line—up or down to decrease or increase the form size you have to work with.

- 1 Choose the Show Form command from the Form menu.
- 2 Move the pointer to the line bordering the hide area.
- 3 When the pointer changes shape (), drag the line up until it is just below the “city” field.

Size the form window back to its original size so you can see both the form and datafile windows.

- Double-click in the title bar of the form window.

Now, when you look at the datafile window, only the names and cities for each restaurant show. The rest of the information still exists in the datafile; it is just hidden from view.

Print the Datafile

At some time, you may want to look at the records in the datafile window, or the fields in the form window, on paper instead of on your screen.

With File, you can print the contents of the datafile window at any time.

Print the records:

All the records in the Good Restaurants datafile should now be in the datafile window. Make sure the bottom of the datafile window reads “20/20.” If it doesn’t, choose the Show All Records command from the Organize menu before you begin to print. File only prints records that are in the window—not the entire datafile and not hidden fields. For the Good Restaurants datafile, File will print only the restaurants’ names and cities, since the other fields are in the hide area.

- 1 Make sure the datafile window is active by clicking anywhere in it.
- 2 Choose the Print Records command from the File menu.
- 3 Choose *Standard*.
- 4 Click the OK button.

File prints the name and city for each restaurant.

Quit File

File saves the information you enter into a datafile as you type it. Therefore, you never have to use the Save command to save the datafile before you quit File. To make sure that you don't lose any information, however, be sure you always choose the Quit command from the File menu before you turn off your Macintosh.

When you quit for the first time after creating a datafile, File saves the work you did in the form window along with the datafile. From then on, however, any changes you make to the appearance of the form are not automatically saved. File will ask if you want to save those changes whenever you quit or open another datafile or form.

You can save a form separately from a datafile and give it a different name, by choosing the Save Form As command from the File menu when the form window is active. When you have more experience with File, you may want to create different forms to use with one datafile. Until then, don't worry about naming or saving forms separately. See Chapter 6, "Designing Forms," for more information on using different forms with different datafiles.

Now, quit File:

- 1 Choose the Quit command from the File menu.
- 2 Click the No button.

Because you made changes to the Good Restaurants form, File will ask if you want to save those changes.

You click the No button here so that if others want to use the Good Restaurants datafile and work through the exercises in "Learning File," they can start from scratch the way you did. You will usually click the Yes button to save any form changes.

Now that you've learned a little about File, you can start creating your own datafiles.

Read the next section, "Using File." Even if you have never used a computer filing system before, you can quickly learn more about File by completing the examples.

What you just did:

In this chapter, you opened the Good Restaurants datafile and learned what a form can look like when List Helper is not checked on the Form menu.

- You then learned how to use the find window to retrieve specific information from a datafile.
- You sorted the information in a particular order by using the sort window.
- You learned about changing the appearance of a form without List Helper.
- You learned how to move and size fields. You also learned how to hide fields in the hide area and how to move the hide line.
- You learned how to print records.

Now you know enough to experiment with changing the Good Restaurants datafile yourself.

For more information about changing the appearance of a form without List Helper, see "Working Without List Helper" in Chapter 6, "Designing Forms."

Let's Review the Basics

You've learned the fundamentals about File, and you are probably eager to start organizing your work. Before you start working with your own datafiles and learning more about File, make sure you understand the basics:

Datafile	Just like a file folder that holds all the information about a particular topic. Microsoft File displays datafiles in the datafile window.
Record	There are many within most datafiles. A record is like a filled-out paper form—it contains one set of information.
Field	There are many within most records. Fields are like individual pieces of information. You name a field and then choose the type of information you will store there.
Form	Determines how all the records in a datafile will look. You create a form in the form window when you first create a datafile. The form window is like a blank paper form.
List Helper	When you create a form for a new datafile, List Helper is working. It arranges information in columns. Fields can be moved and sized, and other fields move to open or close up any leftover space. When List Helper is not checked on the Form menu, you can create more complex, two-dimensional forms.
Find window	When you want to search for records that contain some particular information from your datafile, you type the information in the find window. The find window looks like the form.
Sort window	When you want to put datafile records in order, you sort by clicking in boxes in the sort window. The sort window also looks like the form.

In the next section, you can review the basic Macintosh mouse techniques (click, double-click, and drag), and how to use them with File.

Using the Mouse With File

These are the mouse techniques you use most often with File.



Click

- 1 Point to what you want to select.
- 2 Press and release the mouse button.

Before you click, make sure the pointer has changed to the appropriate shape. File uses different pointer shapes for different functions. For more on pointer shapes, see Chapter 6, "Designing Forms."

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✦ To select a field

Form		
address		phone

I To select an insertion point

4	001459	Pennimore	Susan
5	001090	Swanson	Irene

+ To select a record

4	001459	Pennimore	Susan
5	001090	Swanson	Irene

⏏ To scroll one record at a time



Click the arrow that points in the direction of the record you want to see.

⏏ To scroll by a screenful



Click in the grey area of the scroll bar above or below the scroll box.



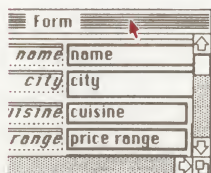
Double-Click

- 1 Point to what you want to select or activate.
- 2 Press and release the mouse button twice in quick succession.

➤ To open an existing datafile from the Finder



➤ To expand a window to full-screen size



Drag

- 1 Point to what you want to drag.
- 2 Press and hold down the mouse button, and move the mouse.
- 3 Release the mouse button.

↔ To size a field



- 1 Point to a field's bottom or right border.
- 2 Drag until the field is the size you want.

➤ To select more than one field



In File, because fields are often close to the title bar or the ruler, it is easier to drag from bottom to top or right to left to select a group of fields in the form window.

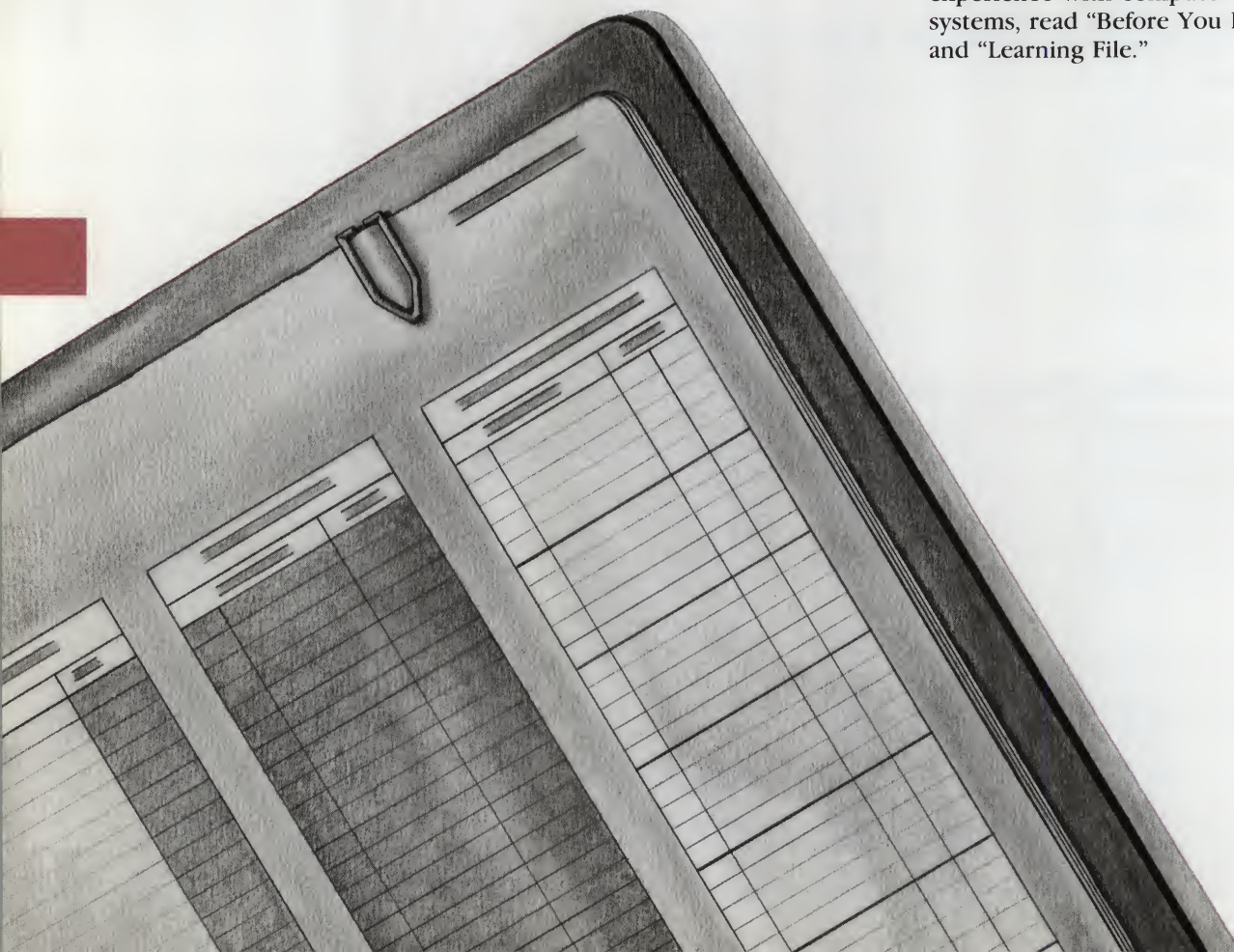
Using File

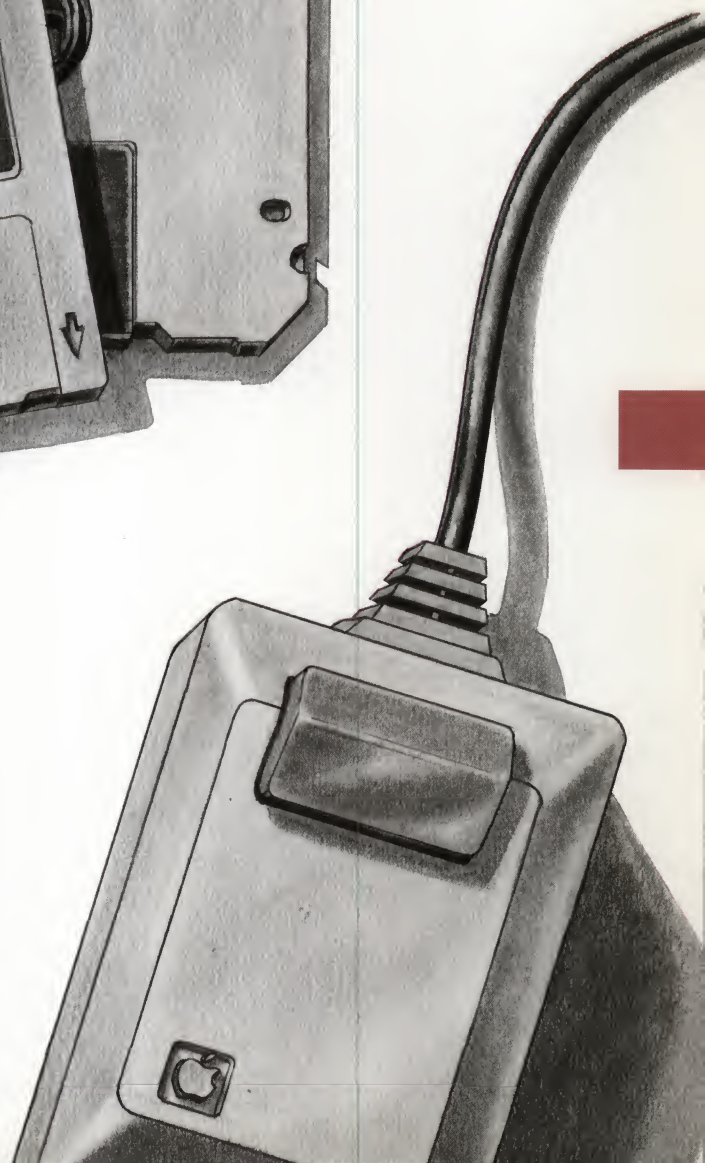
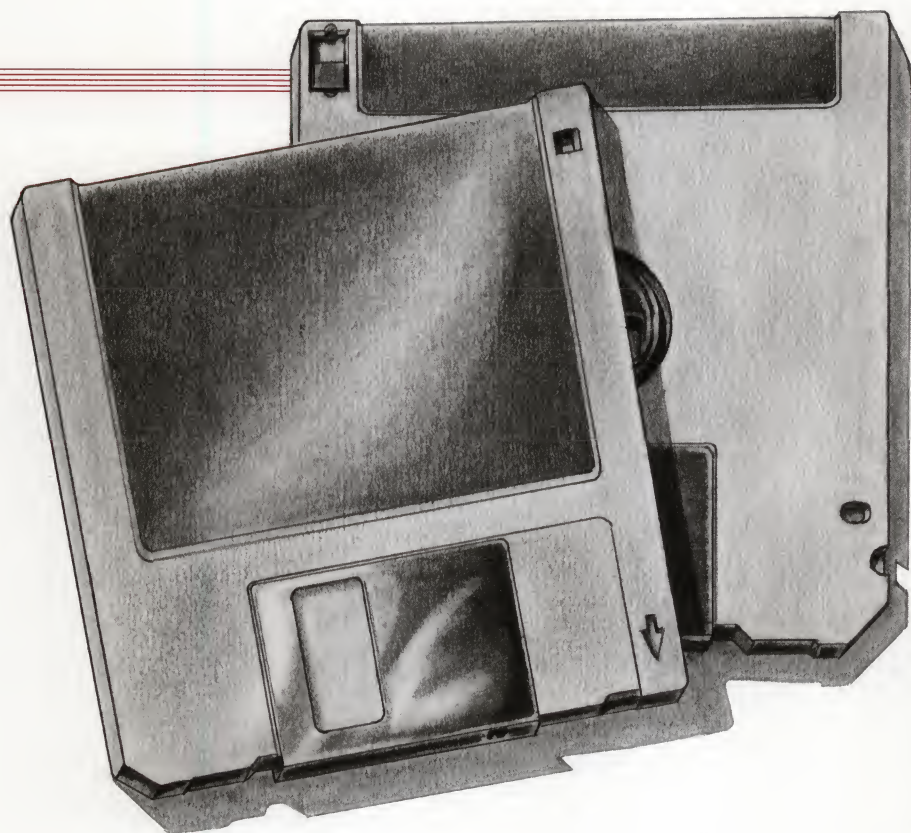
Each section in "Using File" explains general procedures for whatever filing tasks you want to perform. You can go directly to the section you need.

Throughout this part, examples called "Now Try This" illustrate

some of the tasks. You can work through the examples on your Macintosh, or you can just read them. If you have never used a computer filing system before, it's a good idea to work through each example.

"Using File" assumes that you understand the basic concepts of filing systems. If you don't have experience with computer filing systems, read "Before You Begin" and "Learning File."





3 Creating Datafiles

This chapter tells you how to create datafiles and forms, how to choose the type of information (text, numbers, dates, or pictures) you will store in each field in a datafile, and how to add formats to each field.

Naming a Datafile

To create a datafile, you first need to give it a name.

When you open File from the Finder, a dialog box appears. In the dialog box, you either open an existing datafile or create a new one by typing a name.

**If you are already
using a datafile:**

If you are working in a datafile and want to create a new one:

- 1 Make the datafile window active by clicking anywhere in it.
- 2 Choose New Datafile from the File menu.
- 3 Type a name for your datafile.
- 4 Click the New button.

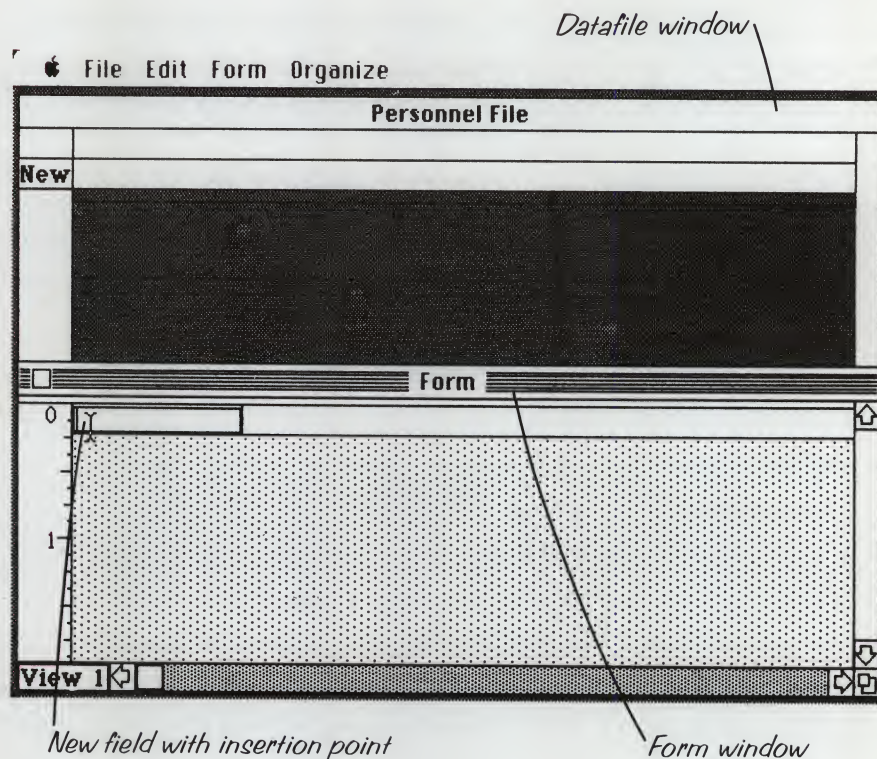
Important Microsoft File is different from other Macintosh applications you may have used. After you give a datafile a name, File saves on your disk any information you enter in the datafile. You do not have to save datafiles before you quit File.

When you create a new datafile, File presents two empty windows: a datafile window and a form window. Every datafile you create has a corresponding form.

Working in the Form Window

The forms you create with File are like paper forms. You fill out different forms all the time: sales orders, job applications, 1040 forms, invoices. In the form window you tell File what kind of information the datafile will hold, and exactly where each piece of information will go.

After you name a datafile, an empty datafile window appears in the background. A form window is active in the foreground, and an insertion point blinks in the New field. You type the first field name in the New field.



List Helper— the easy way out:

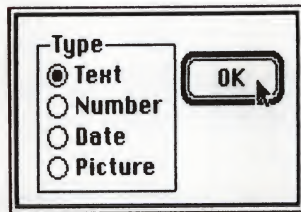
When you create a new datafile, a feature called List Helper helps you set up the form in a basic column format. List Helper is working whenever it is checked on the Form menu.

It's much easier to create forms with List Helper checked. Later, if you don't want your information arranged in columns, you can uncheck List Helper.

When you want to change the size of fields or move them around in the form window, you will need to learn more about the differences between changing the form when List Helper is checked and when it is not checked. Chapter 6, "Designing Forms," explains how to design forms with List Helper and without List Helper.

Creating the Form and Choosing Information Types

When you create each field in the form, File asks you to choose an information type for that field.



Information types can be very useful for organizing your information. When you choose an information type for a field in your datafile, you control the kind of data that can be entered into the field, and how File sorts the information.

For example, if you keep information about sales representatives' commissions, you want only numbers entered into certain fields. If you define those fields as Number fields, File checks the information you enter and displays an error message if the information is not numeric.

Choosing information types also helps when you sort your datafile records. For example, to sort a field containing birthdays into chronological order, you define the field as a Date field. Otherwise, File sorts the birthdays in alphabetical order.

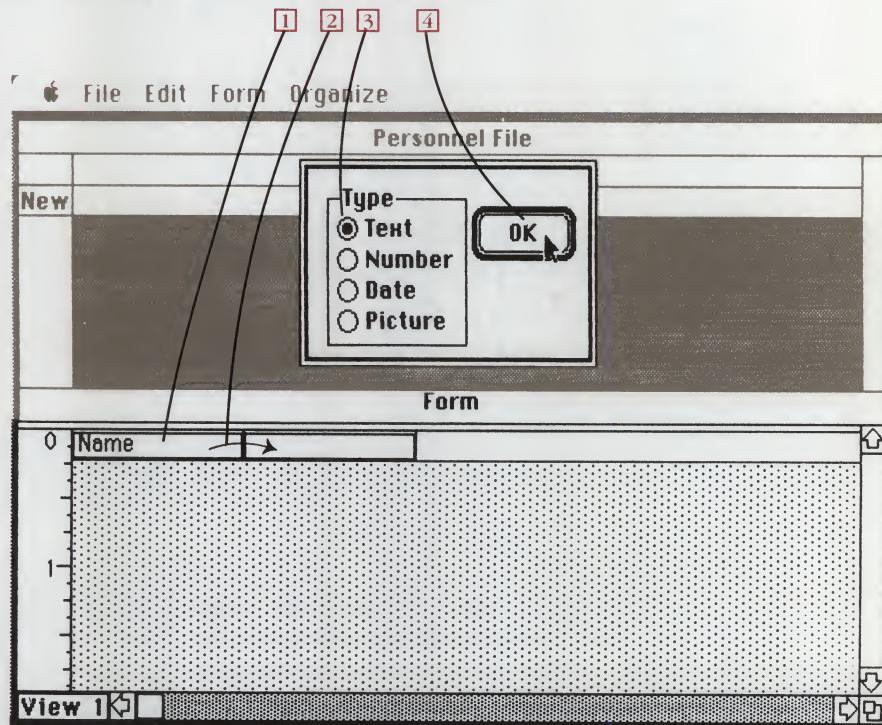
Important

Decide on the information types for fields in a form in the session when you first create the form. Once you add records to the datafile, open another datafile, or quit File, you cannot go back and change information types.

Creating the Form

To create the form for a datafile with List Helper, you type the field names and choose information types for each field.

- 1 Type a name for the first field. As you start typing, another New field appears.
- 2 Press the Return key.
- 3 Choose an information type.
- 4 Click the OK button.



If you are creating a Text field, you can just press the Return key twice because *Text* is preset as an option in the dialog box.

To add a field:

To change information types:

After you choose an information type for a field, the field box and name become bold, the name of the field appears as a heading in the datafile window, and the insertion point moves into the New field. Continue typing names and choosing information types to add as many fields as you need.

If you want to use the keyboard while you create the form, you can type *T*, *N*, *D*, or *P* to select Text, Number, Date, or Picture types. Then press the Return key instead of clicking the OK button.

Anytime you want to add a field to a form, just click to get an insertion point in the New field, type a name for the field, and choose an information type.

If you've just added a field and haven't yet entered information into it, opened another datafile, or quit File, you can change the field's information type.

- 1 Select the field or fields you want to change.
- 2 Choose Format Field from the Form menu. The menu reads Format Text Field, Format Number Field, Format Date Field, or Format Picture Field, depending on the type of field you have selected.
- 3 Choose a different type.
- 4 Click the OK button.

You cannot directly edit a field name after you type the name and press the Return key. However, you can edit the heading above the field in the datafile window. For more information on changing the heading, see Chapter 6, "Designing Forms."

You can change a field name by selecting the field in the form window and choosing Format Field from the Form menu (or by double-clicking on the field), and retyping a name in the dialog box.

For more information on changing a form's design, see Chapter 6, "Designing Forms."

Now Try This

In this example, you will name a datafile and create the basic form for Custom Closet—a clothing company. The sales manager for Custom Closet needs to store information about her sales representatives and their monthly quotas. She has to quickly find information about quotas, actual sales figures, and commissions paid.

Currently, the sales manager fills out a log every month with all this information:

The form is titled "Custom Closet 1984 Sales Quotas". It is a table with four columns for the months: Jan., Feb., Mar., and Apr. There are three rows, each representing a sales representative. Each row has a section on the left with the following labels: Name, Territory, Quota, Actual, % Quota, Base, and % commission. The form is tilted and has a hand-drawn appearance.

The categories on this paper form will become the fields in the form window of Custom Closet's Sales Quotas datafile.

If you haven't started File yet, double-click on the File application icon. If you are already using a datafile, choose New Datafile from the File menu.

First name the datafile:

- 1 Type *Sales Quotas*
- 2 Click the New button.

File provides you with an empty datafile and form. Now create the fields to hold the information. The insertion point is blinking at the New field, waiting for you to type.

- 1 Type *name*
- 2 Press the Return key.
- 3 *Text* is already chosen as the information type, so click the OK button.

The “name” field will contain names of the sales reps.

Notice that as soon as you start to type, another New field appears to the right of the field you are typing in. After you choose an information type (Text) and click the OK button, the insertion point moves to that New field. Now create the rest of the fields for the Sales Quotas form:

<i>Type:</i>	<i>Then:</i>
<i>territory</i>	Press the Return key twice.
<i>actual</i>	Press the Return key, choose <i>Number</i> , and click the OK button.
<i>quota</i>	Press the Return key, choose <i>Number</i> , and click the OK button.
<i>base salary</i>	Press the Return key, choose <i>Number</i> , and click the OK button.
<i>% commission</i>	Press the Return key, choose <i>Number</i> , and click the OK button.

As you type these field names, the form window scrolls to the right when necessary.

If you make a mistake as you type in a field, use the Backspace key and re-type. If you realize you made a typing mistake, but have already pressed the Return key, don't worry about it. You can change the field name later.

What you just did:

In this example, you created a datafile—Sales Quotas—and its form. In the next section, you will learn more about the information types you defined in the form. You will also learn how to make Number fields display dollar amounts, and how to create a computed Number field—a field that derives its value from another field.

If you want to stop for now, choose Quit from the File menu. Microsoft File saves the form you created with the Sales Quotas datafile.

Adding and Changing Formats

Each information type has accompanying formats you use to specify how the information in the field should look. For example, if you want a Number field in your datafile, do you want the numbers displayed as dollar amounts, in bold or italic? The formats available depend upon which information type you choose. When you create a form with List Helper, *Border* in the Style box is dimmed because List Helper draws borders for all fields.

When you create a datafile and form, you can change the information types for fields. As long as you haven't added information to the datafile, quit File, or opened another datafile, File presents a dialog box that allows you to change the information type. After you have added information, quit File, or opened another datafile, you cannot change the type, and File presents a dialog box with formats only.

To change field, heading, or label formats:

You can change formats for fields, headings, or labels at any time, even if you already have information in the datafile window. You can change the formats in either the form window or the datafile window. See Chapter 6, “Designing Forms,” for more information about labels.

- 1 In either the datafile window or the form window, select the field, heading, or label you want to change.
- 2 Choose Format from the Form menu.
- 3 Choose from the available formats.

The Format command on the Form menu changes according to the type of field you select (for example, Format Text Field, Format Number Field, Format Date Field).

Click the title to restore selections in that box to what they were when you first opened the dialog box.

You can index Text, regular Number, or Date fields.

Change the name of a field here.

The 'Format Field' dialog box contains the following elements:

- Title Bar:** 'Format Field' (with a close button icon) and 'Index' (with an unchecked checkbox).
- Name:** A text field containing 'name'.
- Type:** A group box containing radio buttons for 'Text' (selected), 'Number', 'Date', and 'Picture'.
- Display:** A group box containing radio buttons for 'General', 'Dollar', 'Percent', 'Decimal', and 'Scientific'.
- Align:** A group box containing radio buttons for 'Left' (selected), 'Center', and 'Right'.
- Decimals:** A numeric field containing '2'.
- Style:** A group box containing checkboxes for 'Border' (checked), 'Underline', 'Bold', 'Italic', and 'Commas'.
- Computed:** An unchecked checkbox.
- Formula:** An empty text field.
- Buttons:** 'OK' and 'Cancel' buttons.

Annotations with leader lines point to the following elements:

- The 'Format Field' title bar.
- The 'Index' checkbox.
- The 'Name' text field.
- The 'Type' group box.
- The 'Align' group box.
- The 'Decimals' field.
- The 'Style' group box.
- The 'Computed' checkbox.
- The 'Formula' text field.

You can choose a different information type here. The Display box then changes accordingly.

Choose from the available formats.

You cannot choose dimmed options.

You can format fields after you create all the fields in your form, or you can format each field immediately after you type the field name. To format each field as you create it, press Command-D after you type the name and before you press the Return key. In the dialog box, you can choose the information type and formats for the field. Available format options change if you change the information type.

You can also add formats to many fields at once—after creating them all and choosing their information types. See “Formatting Groups of Fields” at the end of this section if you decide to add formats after creating many fields.

Read the following descriptions of the different information types and their available formats. The dialog boxes shown are for formats specific to that information type. If you just created a field, you will see the larger dialog box with formats that change if you change the information type.

Indexed Fields

Indexing is a powerful feature that is available for Text, regular Number, and Date fields. File finds and sorts information based on an indexed field more quickly. When you index a field, File creates an index similar to a book's index. File uses an index for a field just as you would use the index in a book. With the index, you can go directly to the page you need. Without an index for a field, File has to search through many records in the datafile to find information you specify with the Find command. With an index, File can go directly to the records you need.

Apply the index format to fields you frequently use when you find and sort records. It is a good idea to index a field when you use it for finding information from a large datafile. Also, if you do a lot of editing in a particular datafile, it is a good idea to index one field in that datafile. The indexed field helps File add new records more quickly.

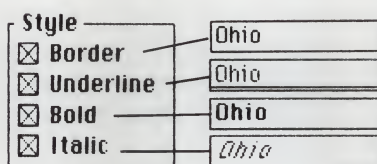
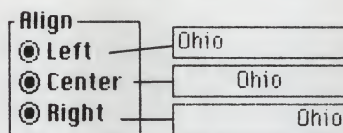
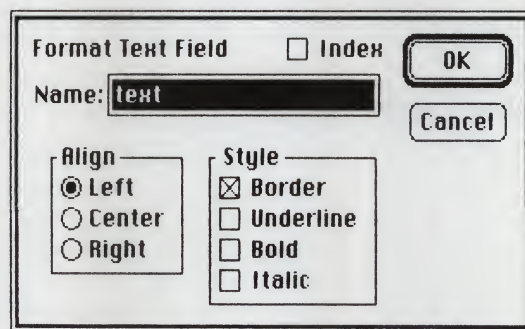
Note

Every datafile with indexed fields has a corresponding index document that takes up space on your disk. Do not index more fields than necessary.

Text Fields

You can usually tell that a field is a Text field if the information in it contains letters or spaces. "1754 Hudson Street," for example, contains both numbers and letters, so it would be in a Text field.

Text fields can have these formats:



Number Fields

A number is any information that can be used mathematically. For example, the number "1754" might be a month's inventory count that is added to other months' counts. The number "1754" in 1754 Hudson Street, however, would not be used mathematically. As an information type, it is considered text. (If you want to sort by house number, make 1754 a separate Number field.) There are two categories of Number fields:

- | | |
|----------|---|
| Regular | Stores the value you enter. |
| Computed | Stores the formula you write when you set up the field. |

If you do not choose *Computed* at the bottom of the Format Field dialog box, File assumes you want to store regular numbers. If you choose *Computed*, you must provide a formula to indicate that the field value will be derived from another field or fields.

Regular Number fields can have these formats:

The dialog box is titled "Format Number Field". It has an "Index" checkbox which is unchecked. There are "OK" and "Cancel" buttons. A "Name:" label is followed by a text box containing "number". Below this are three sections: "Display", "Align", and "Style".

- Display:** Radio buttons for General (selected), Dollar, Percent, Decimal, and Scientific.
- Align:** Radio buttons for Left, Center, and Right (selected). Below these is a "Decimals:" label followed by a text box containing "2".
- Style:** Checkboxes for Border (checked), Underline, Bold, Italic, and Commas (checked).

Type the number of decimal places if you don't want two.

This section shows the "Display" radio buttons with lines pointing to example text boxes:

- General: 1
- Dollar: \$1.00
- Percent: 100.00%
- Decimal: 3,156.00
- Scientific: 3.16E+03

This section shows the "Align" radio buttons with lines pointing to example text boxes:

- Left: 35
- Center: 35
- Right: 35

This section shows the "Style" checkboxes with lines pointing to example text boxes:

- Border: 6790
- Underline: 6790
- Bold: 6790
- Italic: 6790
- Commas: 6,790

If you do not specify a format for your numbers, they appear in general format. General format shows numbers as precisely as possible. If the number does not fit in the field, it appears in scientific notation.

Scientific notation is a way of representing very large or very small numbers. In scientific notation, a number has three parts: the mantissa (an integer or decimal number), E (the exponential operator), and an exponent (a positive or negative integer). Read the number as “mantissa times ten to the exponent power.” For example:

$$\begin{aligned} 1\text{E}-5 &= 1 \times 10^{-5} = .00001 \\ -1.5\text{E}5 &= -1.5 \times 10^5 = -150,000 \end{aligned}$$

To calculate a Number field:

A computed field is a special kind of Number field. It displays the result of a formula you define when you set up the field.

For example, in a datafile that keeps track of sales activity, you might calculate the value of a “commission” field by multiplying it by the “total sales” field. If an individual’s sales commission is three percent of total sales, you would write the formula *total sales * .03* for the “commission” field. Then, when you enter the total sales amounts for each sales rep, File calculates the value for the “commission” field.

You must choose *Number* as the information type before you can define a field as computed.

- 1 Double-click to select the field from the form window.
- 2 Choose *Computed*.
- 3 Type a formula in the formula box.

Important

Define a field as computed when you first create the form, after choosing *Number* as the information type. If you quit File, add records, or open another datafile in the meantime, you will not be able to format the field as computed.

Format Number Field

Name:

OK Cancel

Display <input checked="" type="radio"/> General <input type="radio"/> Dollar <input type="radio"/> Percent <input type="radio"/> Decimal <input type="radio"/> Scientific	Align <input checked="" type="radio"/> Left <input type="radio"/> Center <input type="radio"/> Right Decimals: <input type="text" value="2"/>	Style <input checked="" type="checkbox"/> Border <input type="checkbox"/> Underline <input type="checkbox"/> Bold <input type="checkbox"/> Italic <input checked="" type="checkbox"/> Commas
--	--	--

Formula:

Computed Number fields have the same formats as regular Number fields.

Write the formula for the computed field here.

To write a formula:

Writing a computed field is like using a calculator to calculate values for a field. You add, subtract, multiply, and divide using these symbols:

Type:	To:
+	Add
-	Subtract
*	Multiply
/	Divide

To combine operations, you can surround them in parentheses: *(total sales *.03)/ 2*, for example.

In a computed field formula, you can refer only to Number fields, including other computed fields. If you want to refer to a field you haven't yet created, you can do so as long as you eventually create that field and give it the same name you used in the formula. If you forget to create the field you referred to, File displays "#ERROR!" in the computed field.

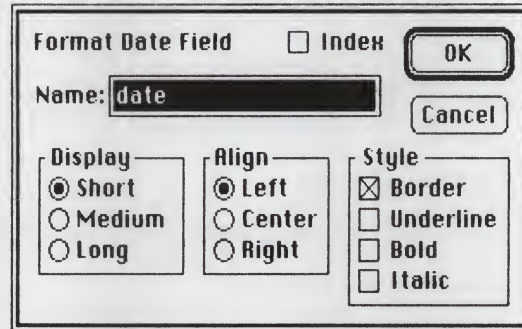
In your computed field formula, you cannot make the computed field refer to itself. For example, *commission - expenses* would cause "#ERROR!" to appear in the "commission" field. Nor can a computed field formula refer to any field that eventually refers back to that computed field.

If you use the Save Records As command, File treats computed fields specially. See Chapter 5, "Organizing Datafiles," for details.

Date Fields

A date is a combination of text and numbers that describes a day of the year.

Date fields have these formats:



Format Date Field ☐ Index OK Cancel

Name:

Display

☒ Short

☐ Medium

☐ Long

Align

☒ Left

☐ Center

☐ Right

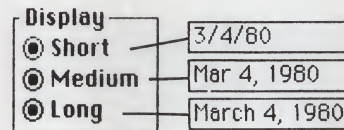
Style

☒ Border

☐ Underline

☐ Bold

☐ Italic

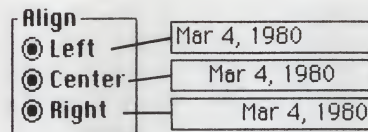


Display

☒ Short — 3/4/80

☒ Medium — Mar 4, 1980

☒ Long — March 4, 1980

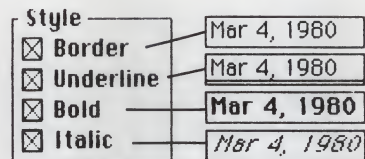


Align

☒ Left — Mar 4, 1980

☒ Center — Mar 4, 1980

☒ Right — Mar 4, 1980



Style

☒ Border — Mar 4, 1980

☒ Underline — Mar 4, 1980

☒ Bold — **Mar 4, 1980**

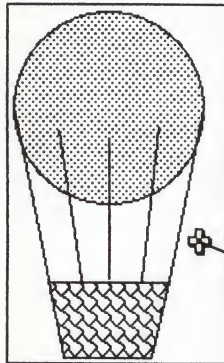
☒ Italic — *Mar 4, 1980*

When you enter information into a Date field, you can enter it in any format: short (10/26/59), medium (Oct 26, 1959) or long (October 26, 1959). After you type a date and press the Return key, File converts to the display you set.

If you type only one number (from 1 to 31) in a Date field, File adds the month and year from the Macintosh clock. If you type two numbers, File assumes that the number you left out is the year. So, 8/23 converts to "Aug 23, 1984."

Picture Fields

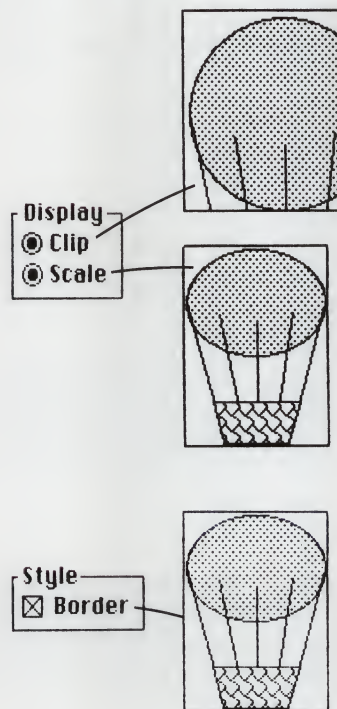
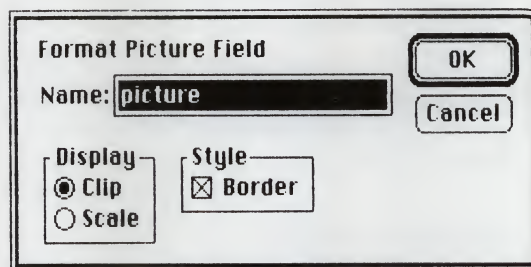
A picture is a document or a portion of a document you created with Microsoft Chart, MacPaint™, or any other program that produces pictures on your Macintosh. You can move a picture from another program into the Clipboard, start File, and then paste the picture into a Picture field in your datafile.



After you have moved a picture to the Clipboard, select a Picture field and choose Paste from the Edit Menu.

You may want to use just a few pictures to make a datafile look exciting, include icons to represent information, or keep an entire datafile with all the pictures you've ever created with Chart and Macpaint, along with information about how and when they were used.

Picture fields can have these formats:

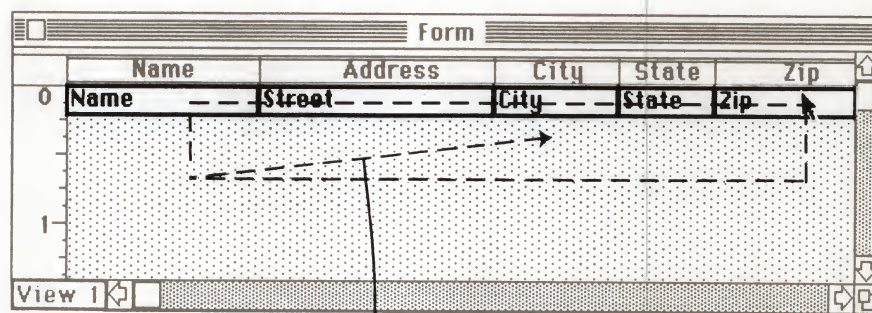


Formatting Groups of Fields

If you want many fields to have the same formats, you can format them all at once. For example, you may want to format several Number fields so they are right-aligned and displayed as dollar amounts.

First learn how to select more than one field at a time:

- If the fields are grouped together, point outside one corner of the fields and drag to the opposite corner. (If the fields are adjacent, you can start dragging from below the fields and drag up.)



When fields are close together, drag to select more than one.

- If the fields are not grouped together, select one field by clicking, then press the Shift key while you select other fields by clicking or dragging.

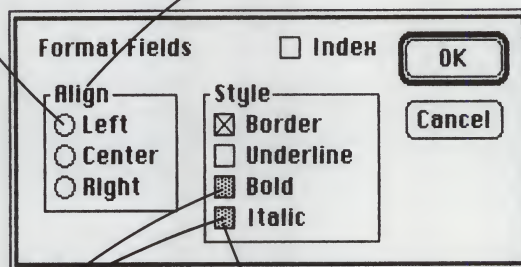
To format more than one field at a time:

- 1 Select the fields using one of the above techniques.
- 2 Choose Format Fields from the Form menu or double-click on any selected field.
- 3 Choose from the available formats.

If the fields you select have different information types, a Format Fields dialog box appears with only the formats common to that group of fields.

A format is not chosen in the Align box because the selected fields have different formats. Choose a format to align all the selected fields alike.

Click the Align box title to leave fields as they were when you opened the dialog box.



Grey in the check boxes indicates some fields have that format, some do not.

☒ *Check to make all the selected fields italic.*

☐ *Uncheck to remove italic from all fields having that format.*

☐ *Click again for grey, to leave fields as they were (some italic, some not).*

Now Try This

Complete this example with the Sales Quotas datafile and form you created when you did the example in the last section. For each field in the form you created, you chose an information type. In this example, you will add formats to these fields and add a computed field.

Make sure the form window is active before you start. (Click in the window or choose Show Form from the Form menu.)

First add a field that calculates the percentage of quota each sales rep reached:

- 1 Select an insertion point in the New field.
- 2 Type % *of quota* and press Command-D.
- 3 Choose *Number* as the information type.
- 4 Choose *Percent* from the Display box.

Now, you are ready to write a formula so that this field derives its value from the “actual” and “quota” fields.

- 1 Choose *Computed*.
- 2 Click to select an insertion point in the Formula box.
- 3 Type *actual / quota*
- 4 Click the OK button.

When you enter amounts in the “actual” and “quota” fields, File calculates what percent of quota the sales rep reached.

Now, make the “name” field indexed:

- 1 Scroll until you see the “name” field.
- 2 Double-click in the “name” field.
- 3 Choose *Index*.
- 4 Choose *Bold* from the Style box.
- 5 Click the OK button.

File displays a message as it prepares the index for the field.

Now the sales manager can sort and find information based on the “name” field more quickly because it is indexed. The information placed in the datafile window (the sales reps’ names) appears in bold type. Now, format three Number fields so they appear as dollar amounts:

- 1 Select the “actual” field.
- 2 Press the Shift key and select the “quota” and the “base salary” fields.
- 3 Point inside one of those fields and double-click.
- 4 Choose *Dollar* from the Display box.
- 5 Click the OK button.

File will display the numbers you type in those three fields as dollar amounts. Number fields are right-aligned unless you choose otherwise.

Now, format the “% commission” field so it appears as a percentage.

- 1 Scroll until you see the “% commission” field.
- 2 Double-click in the “% commission” field.
- 3 Choose *Percent* from the Display box.
- 4 Click the OK button.

What you just did:

In this example, you added information about field types and formats in the form window.

You formatted an indexed field, displayed Number fields as dollar amounts, and wrote a formula for a computed Number field.

In the next chapter, you will learn how to add information to your datafile, and how to edit in the datafile window.

4 Editing Datafiles

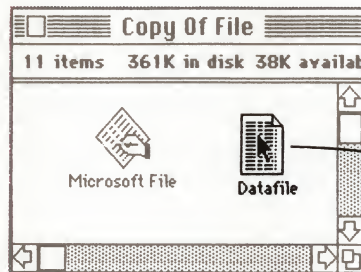
This chapter explains how to add information to your datafile; how to edit that information; how to cut, copy, and paste entire records; and how to add and delete fields from the form.

Adding Information to a Datafile

If you create a datafile, you must first create a form before you can type information in the datafile window. If you haven't already created a form for your datafile, read Chapter 3, "Creating Datafiles."

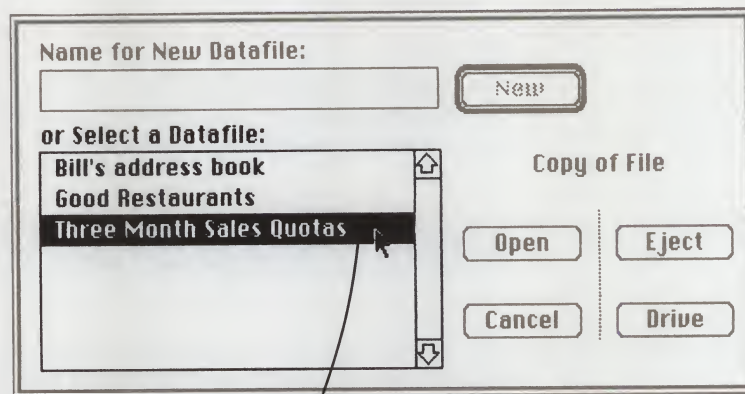
To open a datafile:

To add information to an existing datafile, you open it either from the Finder or when you start File. If you haven't started File, double-click on a datafile icon to start File and open the datafile you want to work on.



Double-click on a datafile icon in the Finder to start File and open a datafile.

If you already started File, open the datafile you need by double-clicking on the datafile name in the list box.



Double-click on a name in the list box to open a datafile.

If you are working in a datafile and want to open another datafile, click in the datafile window and choose Open Datafile from the File menu. Then, double-click in the list box on the name of the datafile you want to open.

You add information to a datafile by filling in the New record, which is always the last record in the datafile window. If you are working with a new datafile, the New record will be the only record in the window. If you are working with an existing datafile, you may have to scroll to the end of the datafile to find the New record.

Don't worry about the order of the records you enter. You can arrange the records in the datafile window when you sort. When you are ready to sort your records, see Chapter 5, "Organizing Datafiles," for more information.

Important

When you work in the datafile window, File saves your records on your disk automatically. You don't need to use the Save command to save your information.

To add information:

- 1 Select any field in the New record.
- 2 Type your information and press the Return key to move to the next field.
- 3 Continue typing and pressing the Return key until you have filled in all the fields in the record.

When you start typing, the New record moves down and File numbers the record you are typing in.

After you complete the last field in a record, pressing the Return key moves the insertion point to the first field of the New record.

If you make a mistake while typing in a field, backspace over the mistake and type in the correct information, or use standard Macintosh editing.

The information scrolls if you type more than a field can display. To see more information, either scroll the field contents or change the field size in the form window.

To scroll the field contents:

- 1 Hold the mouse button down inside the field.
- 2 Drag to the right or left until the information you want to see appears.

Sometimes, you may want to enter the same information into a field in all or most of the records. For example, in your personnel datafile, most people probably live in the same state, some even in the same city. With File, you can copy the information from the same field in the previous record.

To copy from the same field in the previous record:

- 1 Select an insertion point in the field you want to copy information into.
- 2 Press the Command key and the quotation mark key at the same time.

Microsoft File copies the information from the field in the previous record into the current field.

File Edit Form Organize

Personnel File					
	Name	Address	City	State	Zip
1	Mitchell, Sally	3358 Trottnr Ave.	Seattle	WA	98199
2	Gordon, Rick	124 Storybrook Ln.	Bellevue	WA	92017
3	Blanchard, Peggy	223 Main St.	Seattle	WA	98340
4	Zielinski, Tom	4467 Hayster Rd. #376	Seattle	WA	92148
5	Swanson, Irene	2567 Cranston Dr.	Seattle	WA	
New					

Press the Command key and the quotation mark key to copy the value from the same field in the previous record.

To enter the current date into a field:

If you use File for sales orders or other timely data, you may want to keep track of the current day or even the exact time an order was placed.

If you want to enter the current date into a field, File can get it for you from the Macintosh clock.

- 1 Select an insertion point in a Date or Text field.
- 2 Press the Command key and the hyphen key at the same time.

To enter the current time into a field:

If you want to enter the current time into a field, File can get it from the Macintosh clock.

- 1 Select an insertion point in a Text field.
- 2 Press the Command key and the semicolon key at the same time.

To move the selection from field to field or record to record in the datafile window, use the mouse or the keyboard. File moves the selection from left to right, and from top to bottom.

This key:

Return or Tab

Shift - Return

or

Shift - Tab

Enter

Shift - Enter

% - Enter

Shift - % - Enter

Option - Enter

Shift - Option - Enter

Moves the selection to the:

Next field

Previous field

First field in next record

First field in previous record

Same field in next record

Same field in previous record

Record one screenful down

Record one screenful up

When you type a number or date into a Number or Date field, File converts what you type into the format you specified earlier when you created the form. Here are some examples:

If the format is: ***And you type:*** ***File converts to:***

Number Fields

Dollar	50	\$50.00
Percent	.50	50%
General	50%	.50

Date Fields

Long	2/12/84	February 12, 1984
Medium	2/12	Feb 12, 1984 (File adds the current year)
Short	12	2/12/84 (File adds the current month and the current year)

Now Try This

If you completed the examples in the preceding chapters, you created a Sales Quotas form and datafile for Custom Closet. In this example, you will add information about individual sales reps and their monthly quotas.

- 1 Open the Sales Quotas datafile.
- 2 Select the first field in the New record in the datafile window.
- 3 Type *Johnson, Bill* and press the Return key.
- 4 Type *Texas* and press the Return key.
- 5 Type *34870* and press the Return key.

Notice that File changes the number you type and displays it as "\$34,870.00" to match the way you formatted that Number field in the last example.

Now, continue typing in the rest of the information for the two records. Press the Return key after each entry, and be sure to include the percent sign in your entries for the "% commission" field. When you type the amount in the "actual" and "quota" fields, File calculates the value for the "% of quota" field, based on the computed field formula you wrote in the last example. Scroll to see the calculated percentages. Notice that "% of quota" is not included below in the information you type, because File enters that value for you.

<i>name</i>	<i>territory</i>	<i>actual</i>	<i>quota</i>	<i>base salary</i>	<i>% commission</i>
Johnson, Bill	Texas	34870	30000	25500	2%
Grant, Karen	Florida	38450	30000	28700	2%

If you make mistakes while typing this information, backspace and type over the error. If you've already moved past the field, press Shift-Return to move back to the field, or select an insertion point and use commands from the Edit menu to change the information.

Remember that as you type and make changes, File saves your information on the disk for you. You never have to save datafile information with the Save command. However, don't turn off your Macintosh before you quit File. If you do, you may lose data.

What you just did:

In this example, you added information about two sales reps to the Sales Quotas datafile.

After you add information to a datafile, you may have to update records as your information changes. In the next example, you will edit some of the information you just entered.

In the datafile window, the most common kind of editing is changing the information contained in the records. In this case, the commands on the Edit menu work just like other Edit menus you may have used with Macintosh.

After selecting some information, you can cut or copy it from a field of one record, and then paste it into a field in a different record. You can also use the Undo command to reverse your most recent editing command.

Editing Entire Records

This section shows you how to edit entire records or groups of records by cutting or copying them into the Clipboard so you can paste them into a datafile later. Unless you copy records within a datafile to reduce data entry time for records that are similar, you will probably want to cut or copy records from one datafile and paste them into another datafile as a way of transferring information between datafiles.

When you want to delete an entire category of information—for example, all the “account balance” fields and their contents—edit in the form window. Changes in the form window affect every record in the datafile. See Chapter 6, “Designing Forms,” for information on adding, changing, and deleting fields from the form.

Here is an overview of the kind of editing you can do in the datafile window, with the appropriate pointer shapes:

Pointer shape: **You can:**




Click to select an insertion point in a Text, Number, or Date field, or drag to scroll field contents.



Click to select an entire record, a Picture field, or a computed Number field. Drag to select a group of records.

To select records:

Before you can cut and paste entire records, you have to know how to select records and groups of records.

- 1 Point to the record number of the record you want to select.
- 2 When the pointer changes shape (, click to select the entire record.

If you want to select a small group of records:

- 1 Hold the mouse button down on the record number box of the first record you want to select.
- 2 Drag up or down to select the records you want.

To select a large group of records:

- 1 Select one record.
- 2 Scroll up or down to the last record in the group.
- 3 Press the Shift key and select that record to select the entire group.

To copy records into the Clipboard:

When you copy records, File places a copy of the selected records into the Clipboard.

- 1 Select the records you want to copy.
- 2 Choose Copy from the Edit menu.

To cut records into the Clipboard:

When you cut records, File deletes the selected records from the datafile and places them into the Clipboard.

- 1 Select the records you want to cut.
- 2 Choose Cut from the Edit menu.
- 3 Click the OK button in the dialog box that asks if you really want to delete the records from your datafile.

After you copy or cut records into the Clipboard, you can paste them back into the same datafile or into a different datafile. You cannot undo copying or cutting of records.

To paste records into the same datafile:

Instead of retyping information in one record that is similar to another, you can copy the record into the Clipboard and then paste the copy back into your datafile.

During the same File session, when you paste records back into the same datafile they were cut or copied from, File places the fields in order by name. The contents of the fields are linked to the correct field names. So, if you rearrange the fields on the form before pasting, File rearranges the fields in the records you paste to reflect the changes you made.

If you quit File and then open the same datafile and paste from the Clipboard, File places fields by position and discards fields that were in the hide area.

Select the New record before you paste in records from the Clipboard.

- 1 Select the New record.
- 2 Choose Paste from the Edit menu.

Note

When you paste records from the Clipboard, File always places them just before the New record. Therefore, the Cut, Copy, and Paste commands are not useful for rearranging the records in your datafile. See "Sorting Information" in Chapter 5, "Organizing Datafiles," to learn how to arrange your datafile records in a particular order.

To paste records into a different datafile:

To transfer records between datafiles, you can copy or cut records from one datafile and paste them into another.

When you transfer records from one datafile to another, the fields may not always match because one of the datafiles may contain fields that are not in the other datafile. For this reason, File must know whether you want to paste the fields by name or by position.

When you paste fields by name, File copies the contents of the fields to be pasted into fields with the same names in the new datafile. File discards fields with names that do not match.

When you paste fields by position, File ignores the field names and pastes the values according to their position in the form in order from left to right and top to bottom. File pastes all of the field values unless the information types do not match the values, in which case “#ERROR!” appears in the field. Paste by position when you want to ensure that File does not discard fields with unmatching names.

- 1 After cutting or copying the records, choose Open Datafile from the File menu.
- 2 Double-click on the name of the datafile you want to transfer the records to.
- 3 Select the New record in the datafile window.
- 4 Choose Paste from the Edit menu.
- 5 Choose *By Name* or *By Position* from the dialog box.
- 6 Click the OK button.

soc. sec. no.	last name	first name	phone
Jim	Daniel	282-1353	

To clear records from the datafile:

Choosing the Clear command permanently removes selected records from your datafile. The Clear command does not place the records into the Clipboard and you cannot choose the Undo command to get them back. Therefore, you should be sure you want to delete records before you choose Clear. Use the Cut command or the Copy command if you want to place records into the Clipboard.

- 1 Select the records you want to delete.
- 2 Choose Clear from the Edit menu or press the Backspace key.
- 3 Click the OK button in the dialog box that asks if you really want to delete the information from your datafile.

If you are absolutely sure you want to delete the selected records from your datafile, you can bypass the dialog box that asks for confirmation:

- 1 Select the records you want to cut.
- 2 Press the Command key and the Option key while pressing the Backspace key.


Now Try This

If you've completed all the examples to this point, you have a Sales Quotas datafile for Custom Closet with two records for individual sales reps in it.

The sales manager just learned that the sales figures for Bill Johnson are wrong, so now she wants to change them.

- 1 Make sure the datafile window is active by clicking anywhere in it.
- 2 Select the "4" in "\$34870.00."
- 3 Type 5

Another sales rep's quota figures are similar to Bill Johnson's. Instead of retyping all the information, copy Bill Johnson's record and make the necessary changes.

- 1 Point to the record number for record 1.
- 2 When the pointer changes shape () select the record.
- 3 Choose Copy from the Edit menu.
- 4 Select the New record.
- 5 Choose Paste from the Edit menu.

Now edit the fields in the record you just added so they look like this:

<i>name</i>	<i>territory</i>	<i>actual</i>	<i>quota</i>	<i>base salary</i>	<i>% commission</i>
Carter, Mary	Michigan	\$33,992.00	\$30,000.00	\$25,500.00	2.00%

What you just did:

In this example, you edited information in the records in the Sales Quotas datafile, and you learned how to copy a record to save retyping of information.

In the next chapter, you will learn how to organize the records in a datafile. After you have entered your information into datafiles, you will want to arrange the records. With File, you can find specific records, and sort records in a particular order.

5 Organizing Datafiles

This chapter explains how to find information from a datafile, sort information, hide records, and save records in a new datafile.

After you create a datafile and add records, you may want to find certain records, and perhaps order them in a particular way. With File, you don't have to rummage through the many crumpled papers in a file folder. You can find datafile records that match many different criteria. With File, you don't have to collate papers by hand. You can sort datafile records in many different ways and as many times as you want.

Finding Information

After you have added information to a datafile, you will want to quickly search through it and find specific information (for example, all clients who live in Michigan, or all account balances greater than \$5,000).

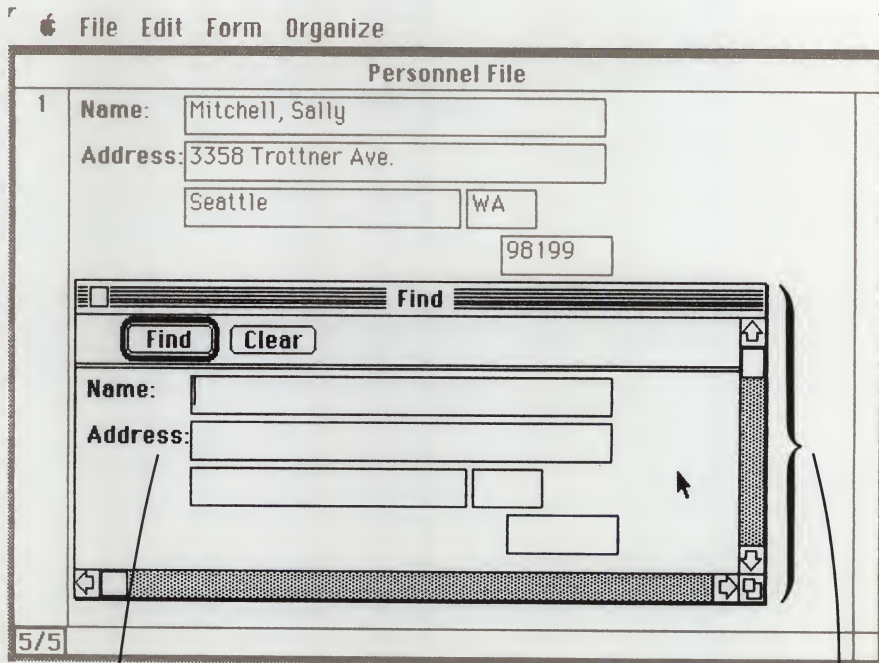
After you do a search, File places in the datafile window only the records it finds. You may have to scroll to see all of them. These records may not include all the records in your datafile. If you want to see all the records in your datafile, choose Show All Records from the Organize menu.

Each time you use the Find command, File searches through all the records in the datafile—even records that are not in the window—to find the records that match the criteria you specify.

To find the information:

- 1 Choose Find from the Organize menu.
- 2 Click in the appropriate field to select an insertion point. Then, type the information you want to find.
- 3 Click the Find button or press the Enter key to start the find.

The find window looks like the form you are using. Fields in the hide area of the form don't appear in the find window. To find information in those fields, bring them above the hide line in the form.



If you include labels in the form, they also appear in the find window.

Find window

To find more specific information:

You can also use symbols called operators to further qualify what you want File to search for. You type an operator along with the information you want to find.

Operator:	Finds values that:
None	Match anything that begins with what you type
=	Match exactly what you type
<> or ><	Do not match what you type
>	Are greater than what you type
<	Are less than what you type
>=	Are greater than or equal to what you type
<=	Are less than or equal to what you type
...	Are within the range you specify

When you use no operator or the = operator, you can use commas to specify more than one item. For example, type =*Earth, Mars* to find all records that match "Earth" and all the records that match "Mars." To find all records that match "Earth," "Mars," and "Mercury," you could type *E, M* in the find window. If the information you want to find includes one of the operators or a comma, put quotation marks around the information. For example, "<>" finds fields that actually contain that symbol, and = "*Earth, Mars*" finds records that have the values "Earth" and "Mars" separated by a comma.

Note	If you want to find a date that contains commas, make sure you put quotation marks around the date. Type " <i>Jan 16, 1985</i> " for example.
-------------	---

You can use the asterisk (*) and the question mark (?) symbols as wildcards for text, numbers, or dates. Use the asterisk as a wildcard for a string of characters. Include one of these special characters when you want to match values in certain positions:

This symbol:	Finds values that:
*	Match any characters (0 or more) in that position
?	Match any character (1 only) in that position

For example, **Air** would find “Delta Airlines,” “AirCal,” and “British Airways,” and *10/26/8?* would find “10/26/80,” “10/26/82,” and “10/26/84.” You can use as many wildcards as you need. When you use wildcard symbols for numbers or dates, you must type the value in the same manner in which it is formatted, for example, general or dollar for Number fields—short, medium, or long for Date fields.

Note

You cannot use a wildcard when you use commas to specify more than one item. Also, File cannot find records with wildcard symbols as field values.

File ignores upper and lower case when finding information. Therefore, *North* matches the values “Northwest,” “northern,” and “north wind.”

File saves any operator and information you type in the find window, until you either delete it or type new information. Therefore, to find records that meet the same criteria you specified for your most recent find, choose Find from the Organize menu and click the Find button.

If you make a mistake while you are typing in the find window, edit the box contents by using the Backspace key and selecting and typing over characters, or by using the Edit menu.

If you make a lot of mistakes, you can clear all the information from the window and start with blank boxes:

- Click the Clear button.

After you click the Find button in the find window to start the search, File presents a status message at the bottom of your screen, and displays the records that match as they are found.

To cancel a search:

Click the Cancel button in the message box if you want to stop File as it searches the datafile. If you cancel as File processes information, the datafile window contains only the records found before you cancelled.

Note

If you frequently search records based on a particular field, it is a good idea to format that field as indexed to speed up the search. See Chapter 3, “Creating Datafiles,” for details about the index format.

Now Try This

In this example, you will find the sales quota figures for Karen Grant.

If you've completed the examples thus far, you have a datafile called Sales Quotas on your disk. You can use this datafile to learn about finding information or you can use a datafile that has been prepared for you. If you didn't create Sales Quotas, open the datafile called Three Month Sales Quotas.

- 1 Choose Find from the Organize menu.
- 2 In the box for the "name" field, type *Gr*
- 3 Click the Find button.

File finds the record for Karen Grant and displays it in the window. If any other sales reps had a last name beginning with "Gr," File would also find their records. Notice that none of the other records appear in the window—just Karen Grant's.

Here are some other examples of the kinds of information the sales manager might want to find, and how she would use the operators in the find window:

<i>Field name:</i>	<i>Type:</i>	<i>To find:</i>
territory	<i>Northwest</i> or <i>=Northwest</i>	Sales reps in the Northwest
quota	<i>>< 30000</i>	Reps with quotas not equal to \$30,000
actual	<i>> 40000</i>	Reps with actual sales over \$40,000
% of quota	<i>>=110%</i> or <i>>=1.1</i>	Reps that reached 110% or more of quota
name	<i><=M</i>	Reps with names beginning with M or before M in the alphabet
name	<i>Adam. . .Eve</i>	Reps from Adam to and including Eve
name	<i>Garrison, Sigler</i>	Reps Garrison and Sigler

What you just did:

In this example, you found the record that contains sales quota information for Karen Grant and learned about the different operators the sales manager might use to find information from the Sales Quotas datafile.

In the next example, you will order all the records in the datafile according to the last name of the sales rep.

Sorting Information

With the Sort command, you can arrange records in a certain order or group together similar kinds of information.

Until you sort, records in a datafile are not organized in a particular order. In most instances you will want to examine, copy, or print records in an order that makes sense for a particular purpose, or for the kind of datafile you have set up. For example, you might sort the names in an address datafile alphabetically by last name:

sorting example				
	last name	address	city	
1	Anders	3500 25 Ave. W.	Franklin	
2	Bell	816 Hill St.	Elwood	
3	Cleaver	5660 Parkside Ct.	Dover	
4	Dowel	4119 Magnolia Ln.	Dover	
5	Gingum	390 Orchard	Elwood	
6	Peters	4187 Victor Ave.	Franklin	
New				
6/6				

Or you could sort to group together the people who live in the same cities, and then alphabetize them by last name within each group of cities:

sorting example				
	last name	address	city	
1	Cleaver	5660 Parkside Ct.	Dover	
2	Dowel	4119 Magnolia Ln.	Dover	
3	Bell	816 Hill St.	Elwood	
4	Gingum	390 Orchard	Elwood	
5	Anders	3500 25 Ave. W.	Franklin	
6	Peters	4187 Victor Ave.	Franklin	
New				
6/6				

After you decide which fields to include when you sort your datafile, you should decide how you want the records to appear:

File sorts Text fields alphabetically. Do you want File to sort beginning with the letter A and ending with Z, or to sort from Z to A?

File sorts Number fields numerically. Do you want File to sort beginning with the smallest number and ending with the largest, or to sort from largest to smallest?

File sorts Date fields chronologically. Do you want File to sort beginning with the earliest date and ending with the latest, or to sort from latest to earliest?

To sort records:

- 1 Choose Sort from the Organize menu.

The fields in the sort window look just like the form. If you have any fields in the hide area of the form window, they do not appear in the sort window. If you want hidden fields to show in the sort window, move them above the hide line in the form window.

- 2 Select the field you want to use to start sorting.

A “1”—the sort order—appears in the small box on the left, indicating that File will sort first by that field. Either “A->Z” or “1->9” appears in the box on the right. This indicates the ordering of records—either alphabetically, numerically, or chronologically, depending on whether the field is a Text, Number, or Date field.

- 3 Click in the box on the right to reverse the sorting order, if necessary.

- 4 Click the Sort button or press the Enter key to start sorting.

The sort window disappears and File sorts the information in the datafile window in the order you specified.

Note

File only sorts the records that are in your datafile window when you choose the Sort command. If you want to sort all records in a datafile, choose the Show All Records command before you sort.

date	total sales	text	num
1 1->9		2 A->Z	

Click in the box to specify the sort order.

To change the sort order, select a sort order number and retype (the other numbers will adjust).

Click here if you want to change the sort order to Z to A. Click again to change it back.

Click in other fields to sort by more than one field. When you click in each additional field, File adds the next sort order number. If you want to reorder numbers, select the number and retype. File readjusts the other numbers for you.

You can use your keyboard to move around in the sort window instead of clicking with the mouse. Use the Tab key to move from field to field. The small box will be selected and you can type the sort order number. Then, use the spacebar to switch between "A->Z" and "Z->A" or "1->9" and "9->1." If there is not yet a sort order number in a field, pressing the spacebar adds the next sort order number. To clear a field, type 0 (zero), or press the Backspace key.

If a field is very narrow, the entire sort indicator may not appear in the box on the right. You can enlarge the field in the form window and then come back to the sort window.

To sort again:

After File sorts records, they stay ordered during the current session unless you sort again, add or edit some records, or find some records. When you come back to the datafile after working with another datafile or quitting File, the records appear in random order. However, File keeps in the sort window the sort information you last specified.

- 1 Choose Sort from the Organize menu.
- 2 Click the Sort button.

File saves the information in the sort window until you clear it or specify a different sort order.

To clear the sort information:

If you make a lot of mistakes while working in the sort window, you can use the Clear button to delete the information in the window.

- Click the Clear button.

You can also delete information from individual fields by first selecting a field and then either choosing Clear from the Edit menu or pressing the Backspace key.

If you have clicked the Sort button and want to cancel the process, click the Cancel button in the message box to stop File as it sorts the datafile. The records in the datafile window stay in random order if you cancel.

Now Try This

For this example, you can use either the Sales Quotas datafile, or the Three Month Sales Quotas datafile—whichever is currently on your screen.

The sales manager for Custom Closet adds information about the sales reps as it becomes available. Therefore, the datafile records are in random order. It would make sense to sort the datafile alphabetically by the last names of the sales reps.

- 1 Choose Show All Records from the Organize menu.
- 2 Choose Sort from the Organize menu.
- 3 Click in the box under “name.”
- 4 A “1” appears in the small box on the left and “A->Z” appears in the box on the right.
- 5 Click the Sort button to start the sort.

What you just did:

In this example, you sorted a datafile according to the sales reps' last names. If you used the Sales Quotas datafile, File sorted only three records—the ones you added in an earlier example. If you used the Three Month Sales Quota datafile, File sorted 20 records.

Hiding Records

After you find records in a datafile, you may end up with some records you don't want in the window. For example, a record may meet the find criteria you specify, but for some reason you don't want to include it in your monthly report. You can hide any records you don't want to see without deleting them from your datafile:

To hide records:

- 1 Make the datafile window active.
- 2 Select the records you want to hide. You can select more than one record by dragging from record number to record number.
- 3 Choose Hide Records from the Organize menu.

Saving Records in a New Datafile

After you find records from a datafile, you may want to save them in a separate datafile. You may also want to save these records as a text document for use with Microsoft Word's Print Merge command.

To save records in a separate datafile:

- 1 Make the datafile window active.
- 2 Make sure the records currently showing in the window are the ones you want in your new datafile.
- 3 Choose Save Records As from the File menu.
- 4 Type a name for the new datafile.
- 5 Choose *Normal* to save records as a new datafile. Or choose *Text* to save records as text.
- 6 Click the Save button.

Computed fields are special:

When you save records to create a new datafile, the new datafile becomes the current datafile. When you save records as text documents, you remain in the old datafile, but File saves the records in a text document you can later copy onto your Word disk. Use this text document as your merge document in Word. See Appendix D, "Using File With Other Applications," for more information.

If your form contains computed Number fields, File calculates the values for each record. In the new datafile, these fields become regular Number fields. If you want to keep computed field formulas in the new datafile, drag those fields into the hide area before you choose the Save Records As command. Formulas for these hidden fields are then transferred to the new datafile. Then, in the new datafile, drag the fields above the hide line, and File calculates them as it did in the old datafile.

6 Designing Forms

This chapter describes how to design forms: how to add, change, and delete fields; how to create forms with and without List Helper; how to use different forms with the same datafile; and how to display the two views of a form. See Chapter 3, “Creating Datafiles,” for basic procedures for creating a form.

Adding, Changing, and Deleting Fields

To add a field:

Work in the form window to add or delete fields, or to change a field name or formats. The procedures for adding, changing, and deleting fields are the same whether or not List Helper is checked.

You add fields at the New field. The New field is the empty field; it doesn't have a name yet. When List Helper is on, the New field is always to the right of the last field in the form. Without List Helper, the New field is near the last field you created, unless you moved fields. When you make the form window active, the New field contains an insertion point. As soon as you type, File scrolls to the New field.

- 1 Type a name for the field and press the Return key.
- 2 Choose one of the information types presented in the dialog box and click the OK button.

Instead of choosing an information type from the dialog box, you can type *T*, *N*, *D*, or *P* for Text, Number, Date, or Picture.

Note

You cannot change a field's information type after adding information into that field, opening another datafile, or quitting File.

To change a field name or format:

You can change the name or formats of a field at any time. In the form window, select the field you want to change. In the datafile window, select an insertion point in a field in one of the records.

- 1 Choose Format Field from the Form menu.
- 2 The name of the current field is already selected in the dialog box. To change the name, you can type over it.
- 3 Choose from the available formats if you want to change them.
- 4 Click the OK button.

To delete a field:

If, while designing a form, you decide to remove one of the fields, use the Clear command.

- 1 In the form window, select the field you want to delete.
- 2 Choose Clear from the Edit menu or press the Backspace key.
- 3 Click the OK button.

When you delete a field from a List Helper form, File deletes the corresponding heading. When you delete fields in non-List Helper forms, however, File does not delete the field headings.

Important

Before you delete a field from the form, be certain that you will not need any of the information contained in that field. The Clear command does not place the deleted field into the Clipboard, and you cannot use the Undo command.

If you are certain you want to delete a field and the information in the datafile, you can bypass the dialog box.

- 1 Select the field from the form window.
- 2 Press Command-Option-Backspace.

Working With List Helper

When you start creating a form for a new datafile, List Helper is checked on the Form menu. When List Helper is checked, File behaves like a list processor, arranging the fields in a column format. Fields are all the same size and line up horizontally.


It's easier to create all the fields for your datafile with List Helper checked. Then, if you want to design other kinds of forms, uncheck List Helper and see the next section, "Working Without List Helper."

This section describes how to work with the various elements in the form window when List Helper is checked. For more complete information on creating a form, see Chapter 3, "Creating Datafiles."

Moving Fields and Changing Column Widths

With List Helper, you can move fields from one column to another in the form window. When you move a field, other fields move over to open or close up space.

To move a field:

- 1 Choose Show Form from the Form menu to make the form window active.
- 2 Point to the field you want to move.
- 3 When the pointer changes shape (), drag the field to where you want it.

As you drag a field, a vertical line shows where File will place the field.

File Edit Form Organize

Personnel File						
	Name	Address	City	State	Zip	
1	Mitchell, Sally	3358 Trottnr Ave.	Seattle	WA	98199	Acc
2	Gordon, Rick	124 Storybrook Ln.	Bellevue	WA	92017	Ind
3	Blanchard, Peggy	223 Main St.	Seattle	WA	98340	Ad
4	Zielinski, Tom	4467 Hayster Rd. #37	Seattle	WA	92148	Art
5	Swanson, Irene	2567 Cranston Dr.	Seattle	WA		
New						

Form

0	Name	Street	City	State	Zip	Tit
1						

The "street" field moves between the "city" and "state" fields.

To change the column width:

When you need to see more information in a field, you can change the width of fields in List Helper by dragging the lines between the fields.

- 1 Point to the right side of the field you want to make wider.
- 2 When the pointer changes shape (↔), drag the line until the field is the width you want.

	Name	City	Address	State	Zip
1	Mitchell, Sally	Seattle	3358 Trottnr Ave.	WA	98199
2	Gordon, Rick	Bellevue	124 Storybrook Ln.	WA	92017
3	Blanchard, Peggy	Seattle	223 Main St.	WA	98340
4	Zielinski, Tom	Seattle	4467 Hayster Rd. #376	WA	92148
5	Swanson, Irene	Seattle	2567 Cronston Dr.	WA	
New					

Form

0 Name City Street State Zip

1

The dotted line shows the field size.

You can also drag lines between fields in the heading of the datafile window.

To make fields taller:

In List Helper, the field height is the same for all fields. You may want to make the fields taller if you want more than one line of information in fields, or if you want a larger space for picture fields. You can make all the fields taller by dragging their bottom line.

- 1 Point to the bottom line of the fields.
- 2 When the pointer changes shape (↕), drag the line up or down until the fields are the height you want.

The screenshot shows a window titled "Personnel File" with a menu bar (File, Edit, Form, Organize). Inside is a table with the following data:

	Name	City	Address	State	Zip
1	Mitchell, Sally	Seattle	3358 Trottnr Ave.	WA	98199
2	Gordon, Rick	Bellevue	124 Storybrook Ln.	WA	92017

Below the table is a "Form" section with a vertical ruler on the left (0 to 1) and fields for Name, City, Street, State, and Zip. A vertical double-headed arrow is positioned at the bottom of the "Street" field, with an arrow pointing to it from the text below.

Drag the bottom of the fields to make them all taller.

To hide fields:

The large dotted area below the bottom of the fields in the form is called the hide area. When you move fields into this area of the form, File keeps them in the form, but hides them from view in the datafile window.

If you want to display only some information from a datafile, you can move fields to the hide area without deleting them from the datafile.

For example, if your personnel datafile contains a "salary" field, you can hide it in the form window, and none of the salaries appear in the datafile window.

File Edit Form Organize

Personnel File					
	Name	Address	State	Zip	
1	Mitchell, Sally	3358 Trottnr Ave.	WA	98199	Account E
2	Gordon, Rick	124 Storybrook Ln.	WA	92017	Industria
3	Blanchard, Peggy	223 Main St.	WA	98340	Administ
4	Zielinski, Tom	4467 Hayster Rd. #376	WA	92148	Art Direc
5	Swanson, Irene	2567 Cranston Dr.	WA		

Form

0	Name	Street	State	Zip	Title
1		City			

The "city" field is in the hide area of the form . . .

. . . so none of the cities appear in the datafile window.

When you drag a field below the hide line in List Helper, other fields move over and close up space.


To edit the headings in the form:

Displaying and Changing Headings

When you create a List Helper form, the field headings in the datafile window are the same as each of the field names, and change as you change the field names. You can edit each heading in the datafile window just as you do any text. When you change a heading so that it is different from its field name, it no longer changes if you change the field name.

With List Helper, space always remains for headings even if you delete all the text in the heading. The space that is left contains any formats you have specified.

When you create a form, File does not display the heading in the form window. While you are working in the form window, you can display and edit the heading.

- 1 Point to the line just below the title bar.
- 2 When the pointer changes shape (, drag the line down. The size of the headings in both the form and datafile windows depends upon how far down you drag.
- 3 Edit each heading as you would any text.

If you want to hide the heading again, point to the line between the heading and the fields and drag up toward the title bar. The heading in the form window disappears. The heading in the datafile window is still visible. With List Helper, you cannot reduce the size of the heading in the datafile window to less than one-quarter inch.

Note

With List Helper, when you move a field in the form window while the heading is visible, the heading travels with the field.

If you move a field into the hide area, the heading is also hidden. If you then move the field back above the hide line, the heading pops back into view.

Here's a summary of designing a form with List Helper.

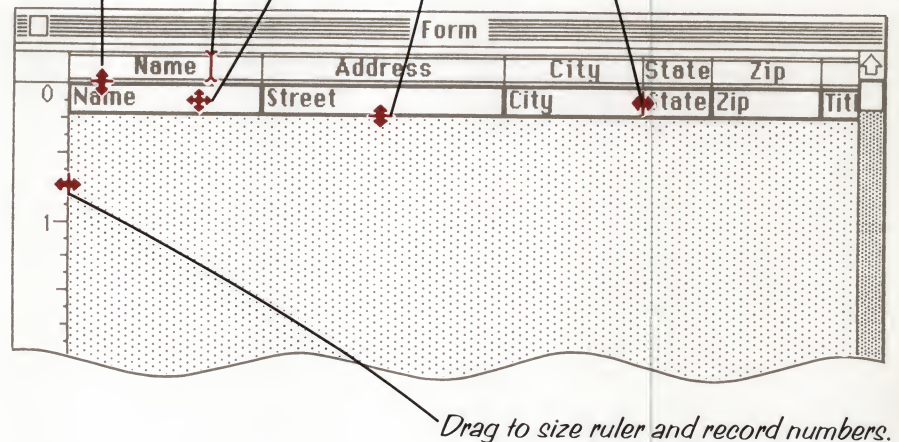
Drag to hide or show headings.

Click to edit heading.

Click to select field.

Drag to size all fields vertically.

Drag to size field horizontally and adjust adjoining fields.




Now Try This

If you've been doing the examples, you now have a form created with List Helper for Custom Closet's sales quotas.

In this example, you will learn more about List Helper by moving, sizing, and hiding fields. Use the Sales Quotas datafile.

First, make all the fields taller:

- 1 Make sure the form window is active.
- 2 Point to the bottom line of the fields.
- 3 When the pointer changes shape () , drag the line down until the dotted line is even with the half-inch mark on the form ruler.

Notice that all the records grow in the datafile window.

Now, move the fields so that the “quota” field comes before the “actual” field.

- 1 Point to the “actual” field.
- 2 When the pointer changes shape (◆), drag the field to the right until the dotted line aligns with the right line of the “quota” field.

Notice that the “actual” field moves into place between the “quota” and “base salary” fields.

The sales manager wants to print some of the information in the datafile, but doesn’t want to divulge salaries and commissions paid to her employees. Move the “base salary” and the “% commission” fields into the hide area.

- 1 Scroll until you see the “base salary” and the “% commission” fields.
- 2 Select both fields, either by dragging, or by selecting one and then pressing the Shift key and selecting the other.
- 3 Drag the fields down into the hide area.

Now, you can no longer see those fields in the datafile window.

While List Helper is still checked, you can try these design techniques yourself. In the next example, you will uncheck List Helper on the Form menu and learn how to transform this form into a more complex one.

Working Without List Helper

Without List Helper, all the elements of the form are independent of the others. Fields are like boxes that you can move anywhere in the form, and size individually. If you uncheck List Helper you are free to design forms that look more like the paper forms you use everyday. When List Helper is not checked, you do all your design work in the form window. For more information on how to create forms when you first create a datafile, see Chapter 3, “Creating Datafiles.”

Moving and Sizing

Without List Helper, you can move fields as separate boxes. However, when you move a field, other fields do not move over to open up space. The field you move will overlap other fields that are in its way.

To move a field:

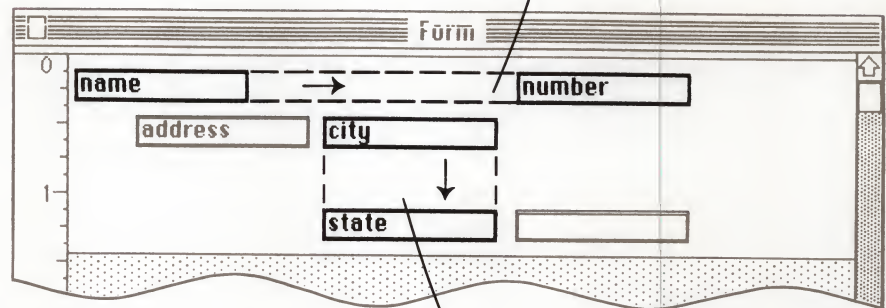
- 1 Make sure the form window is active by clicking anywhere in it, or by choosing Show Form from the Form menu.
- 2 Point to the field you want to move.
- 3 When the pointer changes shape (⬢), drag the field to the new position.

To align a field as you move it:

When moving a field, you may want to keep it on one horizontal or vertical plane so the field stays aligned with other fields or with labels. You can keep a field aligned when you move it, by pressing the Command key while you drag. The direction in which you move first (horizontally or vertically) determines the path File lets you move in.

- Press the Command key while you drag the field.

To keep the "number" field aligned with the "name" field, press the Command key while you drag horizontally.



To keep the "state" aligned with the "city" field, press the Command key while you drag vertically.



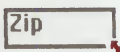
To place one field behind another:

You may want to slide a field behind another one. For example, you can use a Picture field as a background for other fields.

- 1 Press the Option key as you select the field you want to place behind another field.
- 2 Drag the field until it's positioned as you want it behind another field.

To size fields:

You can make fields larger or smaller by dragging. In three areas of a field the pointer changes shape to allow you to change the size of a field:

- Right edge 
- Bottom edge 
- Bottom-right corner (for diagonal sizing) 

To size a field:

- 1 Point to one of these areas.
- 2 When the pointer changes shape, drag that part of the field in the direction you want to size.

Using the Hide Area to Size Your Form

When List Helper is not checked, you can use the hide area to size your form. If you move the hide line down, you open up more space for the form. Without List Helper, you can make your form as long as you want. However, extremely long forms will make scrolling through your records in the datafile window more time-consuming.

If you are interested in arranging a datafile so that you can view it through two different forms, with one form for a pleasing design and another for greater efficiency, see “Views—Every Form Has Two” in this chapter.

Without List Helper, you can either move fields below the hide line to hide them, or you can move the hide line up to cover the fields.

- Drag the fields you want to hide into the hide area.
- or
- Drag the hide line up to cover the fields.

Working With the Heading

When you create a form with List Helper, the heading in the datafile window is the same as the field name. If you change a field name, the heading also changes.

Without List Helper, you cannot directly edit the heading in the datafile window. Instead, you must make the heading visible in the form window and edit it there. Without List Helper, if you delete all the text in the heading, File deletes any heading formats.

To hide a field:

To show the heading in the form:

When you first create a form, you can't see the heading in the form window, but you can make it visible.

- 1 Point to the line just below the title bar.
- 2 When the pointer changes shape (↕), drag the line down until the heading is visible and is the size you want it.

If you want to hide the heading, point to the line above the fields again and drag up.

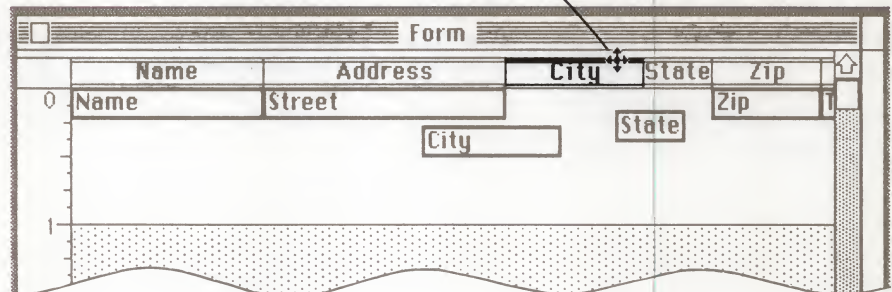
Without List Helper, the amount of heading shown in the datafile window depends upon the amount shown in the form window. If you hide the heading in the form, it is also hidden in the datafile.

Without List Helper, you can move elements of the form independently; you can move and size each heading just like a field. But because text within the heading can be directly edited, unlike fields, you select headings differently:

- 1 Point to the thin bar above a heading.
- 2 When the pointer changes shape (⬢), click to select the heading.

The thin bar at the top of the heading is highlighted when you select it.

Point to the thin bar and click to select a heading.

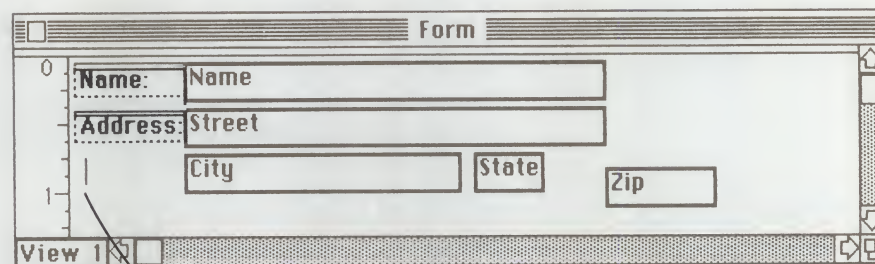


You can move and size the heading just like a regular field.


Adding Labels to Your Form

When List Helper is unchecked, you can add text or picture labels that File will display in every record of the datafile window.

You can insert labels anywhere in your form. Labels can help you design forms that look similar to the paper forms you use everyday.




To add a text label:

- 1 Point anywhere outside a field or heading item.
- 2 When the pointer changes shape (), click to select an insertion point.
- 3 Type the text for your label.

Labels can be pictures instead of text. You may, for example, want to display your company logo in every record in a datafile. You must create the picture in MacPaint, Microsoft Chart, or another graphics program, and then copy or cut it into the Clipboard.

To add a picture as a label:

Use the Paste command to paste a picture from the Clipboard to create a label.

- 1 Make sure you have a picture in the Clipboard.
- 2 When the pointer changes shape (), click to select an insertion point. Do not click inside an existing label.
- 3 Choose Paste from the Edit menu.

Here's a summary of designing a form without List Helper.

Click to edit label.

Click to select label.

Drag to size ruler and record numbers.

Click to select field.

Drag to size field horizontally.

The screenshot shows a form design window titled "Form". The form is divided into sections by a dotted line. The top section contains fields for "Name", "Address", "City", "Stat", and "Zip". The bottom section contains fields for "Title", "Start Date", "Office Ext.", and "Home Phone". A ruler is visible on the left side of the form, with record numbers 0, 1, and 2. Arrows point to various parts of the form, indicating how to interact with them. The "View" button is at the bottom left.

Drag to size field vertically.

Click to select insertion point for a label.

Drag to move hide area up or down.

Drag to size field both horizontally and vertically.

Designing a Quick Vertical Form

The Vertical Form command on the Form menu builds a special non-List Helper form for you. You can choose the Vertical Form command whether or not List Helper is checked.

If you are working with List Helper and choose the Vertical Form command, File:

- Unchecks List Helper.
- Arranges all the fields from top to bottom.
- Creates a label to the left of every field.

You can design a vertical form as you would a non-List Helper form. You can select, move, and edit labels just like headings.

If you make changes to the form and move between List Helper and the Vertical Form command, File asks if you want to save the current form with the datafile. If you want the form you just changed to be saved along with the datafile, click the Yes button. If you are just experimenting and don't want any changes saved, click the No button.

Form					
	Name	Address	City	State	Zip
0	Name	Street	City	State	Zip

View 1

Form

- Show Form
- ✓List Helper
- Vertical Form
- Format Fields... ⌘F
- Set Font...

Form	
0	Name: Name
	Address: Street
	City: City
1	State: State
	Zip: Zip
	Title: Title
	Start Date: Start Date
2	Office Ext.: Office Ext.
	Home Phone: Home Phone
	emerg.name: emerg.name
3	address: address
	address2: address2
	phone: phone
	address2: address2

View 1

Now Try This

In the last example, you moved, sized, and hid fields with List Helper checked on the Form menu.

In this example, you will uncheck List Helper and then move, size, and hide fields. Watch how differently File behaves when List Helper is not checked.

Use the Sales Quotas form and datafile you created in earlier examples.

- Choose List Helper from the Form menu to uncheck it.

After you uncheck List Helper, the form looks the same. You won't see any difference until you start moving things around.

- 1 Point to the bottom line of the fields above the hide area.
- 2 When the pointer changes shape (↕), drag down until the dotted line is even with the 1-1/2-inch mark on the form ruler.


Notice that instead of expanding, as with List Helper, fields remain their original size. The hide area just moves down and opens up more room for each record.

Now, move a field:

- 1 Point to the "name" field.
- 2 When the pointer changes shape (↕), drag the field down and to the right into the area you just opened up.

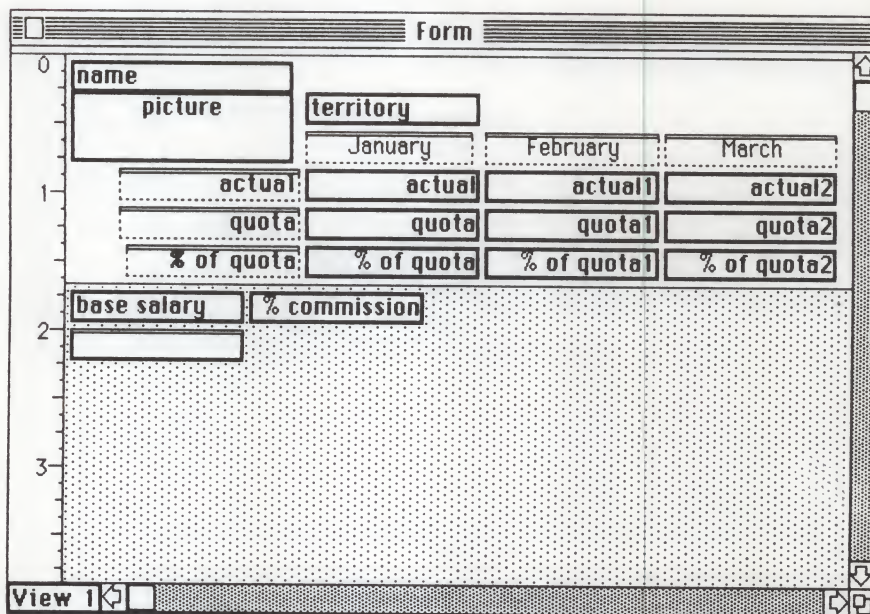
If you drag a field over another field, the field you are dragging covers the other field.

Now, size the field:

- 1 Point to the right side of the "name" field.
- 2 When the pointer changes shape () , drag the line to the right about one-half inch.

If you'd like, you can look at a complex form for a datafile similar to this one. It contains all the fields you created earlier and a few more. (You may have used this datafile for the examples in Chapter 5.)

- 1 Click inside the datafile window to make it active.
- 2 Choose Open Datafile from the File menu and click the Yes button if you want to save your changes to the form. Click the No button if you were just experimenting.
- 3 Double-click on "Three Month Sales Quotas."
- 4 Choose Show Form from the Form menu.



The screenshot shows a window titled "Form" with a vertical ruler on the left side ranging from 0 to 3. The form contains several fields and a table:

- name**: A text field at the top left.
- picture**: A larger text field below "name".
- territory**: A text field to the right of "picture".
- January**, **February**, **March**: Three text fields arranged horizontally below "territory".
- actual**, **actual1**, **actual2**: Three text fields arranged horizontally below the month fields.
- quota**, **quota1**, **quota2**: Three text fields arranged horizontally below the "actual" fields.
- % of quota**, **% of quota1**, **% of quota2**: Three text fields arranged horizontally below the "quota" fields.
- base salary**, **% commission**: Two text fields arranged horizontally at the bottom.

The bottom of the window shows a status bar with "View 1" and some navigation icons.

This is an example of the kind of form you can create when List Helper is not checked on the Form menu.

Setting Fonts for Fields

Microsoft File displays all characters on the screen in the standard application font.

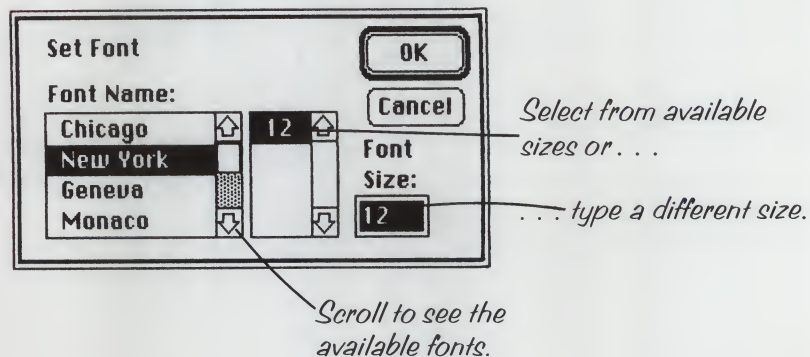
You can change the font for fields, labels, or headings by selecting what you want to change and by choosing Set Font from the Form menu.

You may need to resize the field to see all the information in it, depending upon the font and the size you choose.

You can change fonts for fields, labels, or headings. Select one or a group in any combination.

To change the font for fields, labels, or headings:

- 1 Select items from the form window, or select an insertion point in the field or heading in the datafile window.
- 2 Choose Set Font from the Form menu.
- 3 Choose a font from the list box on the left and a font size from the list box on the right.



The available font sizes change for each font you choose. When you choose a size from the list box, it appears in the Font Size box. If you want a size different from the ones listed, type the size you want in the box. If you type a size different from the ones available for a particular font, File produces the size as closely as possible; the results may look ragged.

To change the font for all fields:

Change the font for all fields from the form window.

- 1 Choose Show Form from the Form menu.
- 2 Choose Select All from the Edit menu.
- 3 Choose Set Font from the Form menu.
- 4 Choose from the available fonts and sizes.

Now Try This

Change the font of the “name” field in the Three Month Sales Quotas datafile:

- 1 Select an insertion point in one of the “name” fields in the datafile window.
- 2 Choose Set Font from the Form menu.
- 3 Select a different font and click the OK button.

All the names in the datafile change font. Names that were bold in the old font become bold in the new font.

Views—Every Form Has Two

123

A form not only allows you to specify places for your information, it also gives you a way to view the information in your datafile. With forms, you control the amount of information shown in the datafile window, and how that information appears.

With File you can create large forms exactly like the paper forms from which you took information. Such forms might be ideal for reducing data entry mistakes, but they are not as good for viewing large amounts of information at once.

Every form for a datafile has two views so you can quickly change how information appears. When you first create a form it consists of:

- | | |
|--------|--|
| View 1 | The form you create with the datafile. |
| View 2 | An alternate, preset List Helper form. |

From then on, you can redesign each of these views to fit your needs.

To alternate between views:

With two views of a form, File becomes even more flexible. With a large invoice form, for example, you might want to find all customers who have an account balance over \$500.00. After you find the information, you might prefer to view it in a list format. If you didn't have the view capability, you would have to scroll the datafile window to see each large record.

Instead, you can quickly switch to the alternate view of the form and see more records at once.

There are four ways to alternate between the two views of your form:

- Double-click in a record number in the datafile window.
- Double-click in the "ruler" in the form window.
- Click the view indicator ("View 1" or "View 2") in the form window.
- Press Command-T.

When you double-click in the record number, File brings that record within full view in the datafile window. If the form is very large, you may have to scroll to see the entire record.

Note

If you are using a List Helper form and switch to View 2, you may not see any change in the form. Redesign one of the views and you will see a difference.

To redesign either view:

Redesign either view of the form by moving, sizing, and formatting fields as you would normally.

- 1 Change to the view you wish to change.
- 2 Design that view of the form to fit your needs.

File saves Views 1 and 2 and any changes you make to them along with the form. File saves the views whether you save the form separately or with the datafile.

Form

0 Name: Name

Address: Street

1 City State Zip

2 Title: Title Start Date: Start Date

Office Ext.: Office Ext. Home Phone: Home Phone

3 In Case of Emergency: emerg.name

address

address2

View 1

View 1 shows a large complex form.

Form

0 Name Title Start Date

Street Zip Office Ext. Home Phone

State City

1 emerg.name address

address2 phone

2

3

View 2

View 2 shows a streamlined version of the same form.

Now Try This

In this example you will design the Three Month Sales Quotas form to make best use of its two views. Open the Three Month Sales Quotas datafile if it isn't already on your screen.

The sales manager initially set up this form because it resembled the log sheets she was using to record the quotas when the reps called them in every month. Now, however, she realizes that she frequently uses this datafile to find all the sales reps who have not met their monthly quotas. All the other information (territory, actual sales, and the quotas themselves) gets in the way. Fix the two views of this form so she can quickly alternate between her large form and one that shows only the "name" and "% of quota" fields.

- 1 Choose Show Form from the Form menu.
- 2 Click in the view indicator to change to View 2.

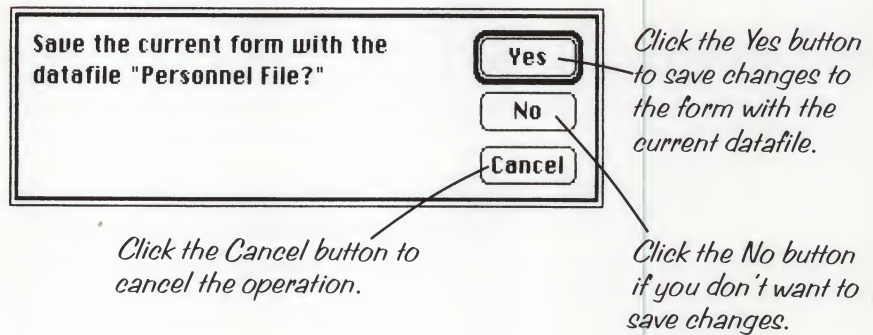
Now the view has changed. You still have the other view intact. Any changes you make now in the form window affect only this view. Now change View 2 of this form so that only the "name" and "% of quota" fields appear above the hide area.

- 1 Select all the fields and labels that now appear above the hide line, except "name," "% of quota," "% of quota1," and "% of quota2."
- 2 Drag the fields and labels you selected into the hide area.

The View 2 form now has only four fields above the hide line. Click in the view indicator to bring back View 1 and see the difference.

Saving Forms

The first time you quit File or open a datafile after creating a new datafile, File saves the form along with the datafile containing it. After this first time, File will ask if you want to save your form changes when you move to another datafile or form, or when you quit.



Most times, you will click the Yes button to save the changes you made to the form along with the datafile. You might click the No button if you were just experimenting with the form design, or just wanted a temporary change to look at specific information. Click the No button and File does not save the changes to the form.

File always saves a form along with each datafile, but you can also save a form separately from the datafile. You might want to use the same form, not only with the original datafile, but with others. You can, for example, create a mailing label form and use it with all your datafiles that contain similar fields: name, address, city, state, and zip code. That way, you always have a mailing address ready—whether for your customer invoice datafile or a personnel datafile.

To save a form separately:

Save a form with the Save Form As command when you want it separate from a datafile.

- 1 Make sure the form window is active.
- 2 Choose Save Form As from the File menu.
- 3 Type a name for the form.
- 4 Click the Save button.

To save form changes with a datafile:

Save a form with the Save Form command when you want it saved with the current datafile (and with the same name as the datafile).

- 1 Make sure the form window is active.
- 2 Choose Save Form from the File menu.

If you make changes to a form and then quit File or open another datafile or form, File asks if you want to save the form with the current datafile. Click the Yes button and File saves the form with the datafile.

Note

When File saves a form, either with a datafile or separately, it saves both View 1 and View 2 of the form.

To open a different form:

When you are working with a datafile, you might want to use a different form with it.

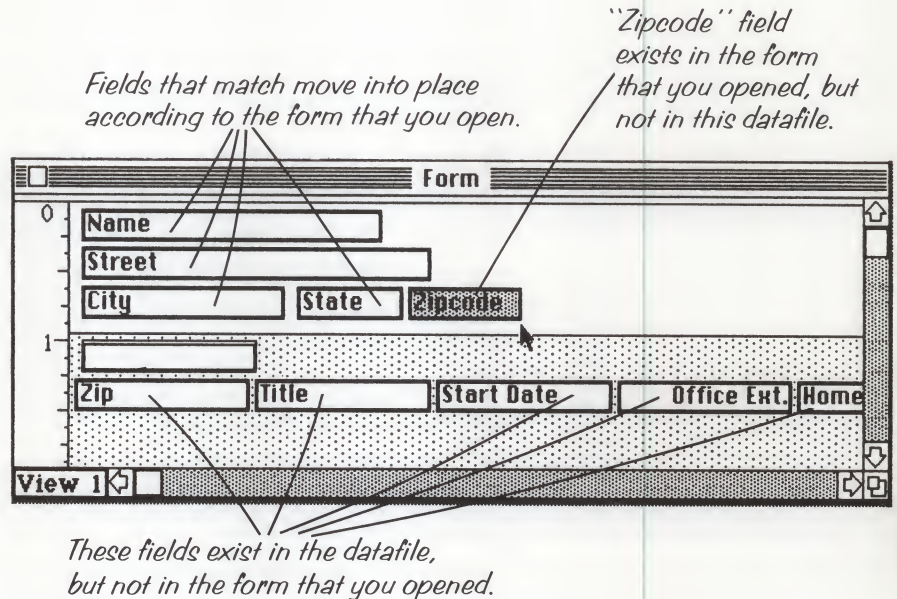
- 1 Make sure the form window is active.
- 2 Choose Open Form from the File menu.
- 3 Choose a form from the list box.
- 4 Click the Open button.

If you made any changes to the form you were working with, File asks if you want to save it along with the datafile before you open another form. Click the Yes or No button accordingly.

The names of the forms in the list box consist of forms you have saved separately, and forms that are saved with datafiles. The forms saved with datafiles have the same name as their datafile.

When you open a form, the fields in it may not match the fields in the datafile you are using. If fields exist in the datafile, but not in the form you just opened, they will appear below the hide line in the form window. If you want to see these fields, bring them above the hide line.

If fields exist in the form, but not in the datafile, they will appear grey in the form window.



To add grey fields to the datafile:

If you want the grey fields from the form you opened to appear in your datafile, you don't have to recreate them.

- 1 Select the grey fields in the form window.
- 2 Choose Format Field from the Form menu.
- 3 If you want to change formats, do so.
- 4 Click the OK button.

File formats the grey fields and adds them to the datafile. In the form window, the fields are no longer grey.

Now Try This

Before you begin, make sure you are using the Three Month Sales Quotas datafile. In this example, you will change Custom Closet's Three Month Sales Quotas form and save the changed form separately from the datafile. The sales manager's boss has requested specific information that isn't presented well in the current form. You will change the form to show only one month's set of figures and the "base salary" and "% commission" fields. After you save the changed form separate from the datafile, you will still have the original form saved along with the datafile.

- 1 Double-click in the title bar of the form window, and make sure View 1 is showing.
- 2 Select the labels "January" and "February," and the fields under them.
- 3 Drag the fields and labels below the hide line.
- 4 Select the label "March" and the fields under it, and drag them to the left until they are under "territory."
- 5 Select the "base salary" and "% commission" fields from the hide area.
- 6 Drag the fields up to the right of "territory."

Now, save the form separately.

- 1 Choose Save Form As from the File menu.
- 2 Type *Form For Boss*
- 3 Click the Save button.

You now have a form named Form For Boss saved on your disk. Now you can return to the form you started with by using the Open Form command. When File asks if you want to save the changes you made with the current datafile, click the No button. These changes are for the separate Form For Boss form only. You want the Three Month Sales Quotas form you started with saved along with the datafile.

- 1 Choose Open Form from the File menu.
- 2 When File asks if you want to save changes, click the No button.
- 3 Double-click on "Three Month Sales Quotas." The form File saves along with the datafile has the same name as the datafile.

Your old form is back, and now you have a separate form called Form For Boss. You can use the new form with this same datafile by choosing Open Form from the File menu.

7 Designing Reports

This chapter explains how to create and preview reports from the information in your datafiles. For information on printing reports, see Chapter 8, "Printing."

You probably spend a lot of your filing time keeping information up to date, organizing information by finding and sorting, and creating different forms to display the information in different ways. Once you have set up your filing system, you will want to analyze your information. You want some way to group similar kinds of information together to produce meaningful summaries or to determine trends.

A report presents records from a datafile in a table format. A field from a datafile becomes a column in the table. A record becomes a row in the table.

Weekly Sales Report

Page header

Column headings

Item Name	Sales		Sold by
Tooth Picks	\$11.76	XXXX	McKendry
	\$16.98	XXXX	Bemmaman
	\$19.84	XXXX	Elworth
	\$22.97	XXXX	Elworth
	\$25.98	XXXX	McKendry
	\$33.98	XXXX	Kasper
	\$44.09	XXXX	Greggs
	\$55.96	XXXX	McKendry

"Sold by" field
from datafile

Total for Tooth Picks:

\$231.56

Pencils	\$9.89	XXXX	Greggs
	\$9.98	XXXX	Greggs
	\$14.35	XXXX	Greggs
	\$14.98	XXXX	Elworth
	\$19.98	XXXX	Brayton
	\$22.98	XXXX	Greggs
	\$23.98	XXXX	Elworth
	\$24.39	XXXX	Bemmaman
	\$44.98	XXXX	Kasper

Record from
datafile

Total for Pencils:

\$185.51

Chop Sticks	\$19.78	XXXX	Kasper
	\$19.89	XXXX	Elworth
	\$19.98	XXXX	Bemmaman
	\$21.98	XXXX	Bemmaman
	\$22.98	XXXX	Elworth
	\$32.98	XXXX	Kasper
	\$34.33	XXXX	Bemmaman
	\$35.98	XXXX	Elworth
	\$41.33	XXXX	Kasper

Total for Chop Sticks:

\$249.23

Total:	\$666.30
--------	----------

A basic report is similar to a datafile created in List Helper. When you create a report from records in a datafile, however, you can group records by sorting, and then perform mathematical functions like totaling and averaging that you cannot accomplish with computed Number fields.

Because computed Number fields only calculate values within a record, you cannot sum all the account balance fields for a group of records in an invoice datafile. With reports, however, you can total groups of information easily—and request a grand total of all groups and perform other functions with your information.

The "Average" field is a computed field that calculates the average commission within each record (for each sales rep).

Datafile

Average Commissions					
	Sold by	Week 1	Week 2	Week 3	Average
1	Elworth	\$3.67	\$2.77	\$3.65	\$3.63
2	Brayton	\$2.35	\$2.76	\$2.79	\$2.63
3	Greggs	\$2.67	\$2.45	\$2.56	\$2.56
4	McKendry	\$3.45	\$4.51	\$2.48	\$3.48
5	Bemmaman	\$3.51	\$2.75	\$2.99	\$3.08
6	Kasper	\$3.44	\$2.08	\$2.45	\$2.66
New					
6/6					

Report

3 Week Totals and Average Commission Paid

Sold by	Average	Week 1	Week 2	Week 3
Bemmaman	\$3.08	\$3.51	\$2.75	\$2.99
Brayton	\$2.63	\$2.35	\$2.76	\$2.79
Elworth	\$3.63	\$3.67	\$2.77	\$3.65
Greggs	\$2.56	\$2.67	\$2.45	\$2.56
Kasper	\$2.66	\$3.44	\$2.08	\$2.45
McKendry	\$3.48	\$3.45	\$4.51	\$2.48
Total:		\$19.09	\$17.32	\$16.92
Average:	\$3.01			
Average commission paid to all sales reps		Total for Week 1	Total for Week 2	Total for Week 3

After you create a report, you probably want to see it on paper. With File, you can preview a report before you send it to the printer. Then, if you want to include different records in the report, change headings or column widths, or calculate different values, you can make your changes without wasting paper and printing time.

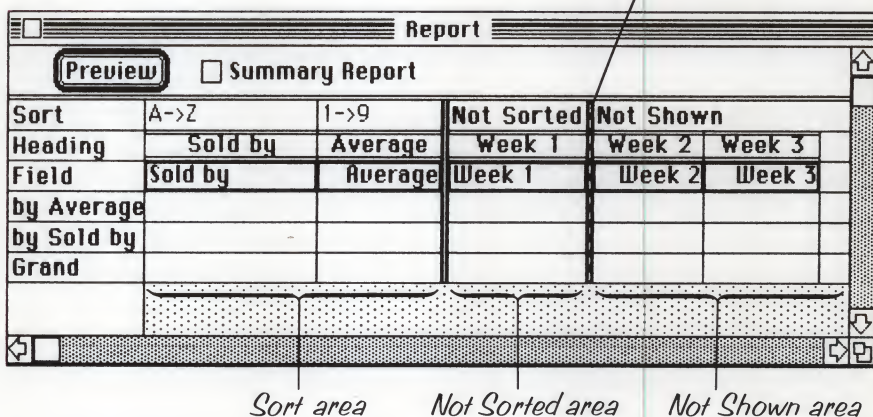
Creating Reports

To create a report:

First decide what information from a datafile you want to include in your report. File bases a report on the records in the datafile window. Use the Find command to search for the records you want included (see Chapter 5, “Organizing Datafiles,” for information on the Find command). If you want all the records from a datafile included in the report, choose Show All Records from the Organize menu.

After you find the records you want to include in a report, you design the report’s format—grouping of records, column widths, column headings, and summary information. You create a report design in the report window.

- Choose Report from the Organize menu.



Designing reports is similar to designing forms with List Helper. File initially creates a report’s design from the current form. File arranges the fields horizontally and displays a heading above each field name.

If the report window has never been opened, File places fields hidden in the form’s hide area in the Not Shown area of the report window. If you previously sorted the records with the Sort command, File places the fields you last sorted by in the Sort area of the report window.

File places the remaining fields in the Not Sorted area. To set up how your report will look on paper, you move the fields in the report window in and out of these three areas:

Area:

Contains:

Sort

These fields determine what File puts in the first columns of the report and how File groups and orders the information in the remaining columns. Any fields that you sorted by previously with the Sort command are placed in the Sort area the first time you open the report window. If you have not sorted the datafile, you won't see this area. File places fields in their sort order from left to right. You can change how File sorts a field by clicking to change "1->9" to "9->1" and "A->Z" to "Z->A" in the top row of the area.

Not Sorted

These fields make up the rest of the columns in the report. Any fields you have in the datafile that aren't sorted and are not in the hide area of the form are placed here the first time you open the report window.

Not Shown

These fields do not appear on the report. Any fields in the hide area of the form are placed here the first time you open the report window.

To move fields:

Move fields and their headings into the three areas by dragging the field name from the "Field" row only:

The screenshot shows a report designer window titled "Report". It has a "Preview" button and a "Summary Report" checkbox. Below these are several rows: "Sort" (A->Z, 1->9), "Heading" (Sold by, Average, Week 1, Week 2, Week 3), "Field" (Sold by ::, Average, Week 1, Week 2, Week 3), "by Average", "by Sold by", and "Grand". A dotted line is visible at the bottom of the report area. Arrows point from the text below to the "Field" row and the column headers.

Move fields by dragging from this row only.

Drag to widen columns.

When you drag a field, its heading travels with it. When you drag, watch the dotted line that appears to determine where the field will be placed.

The screenshot shows the same report designer window. Arrows point from the text below to the dotted line in the "Sort" area and the dotted line in the "Not Sorted" area.

If you drag the field until the dotted line appears here, it is still in the Sort area, but after the "Average" field.

If you drag the field until the dotted line appears here, it is the first field in the Not Sorted area.

To drag more than one field, first select one field, then hold down the Shift key while you select the others you want to move. Then drag the fields into one of the areas.

The Sort, Not Sorted, and Not Shown areas are separated by double lines. Move fields into and out of the areas when the dotted line appears past the double line of the area you want to move it into. When there are no fields in an area, that area is not visible in the report window. When an area is not visible, it is represented by a line between the double line of the other areas. A hidden area appears if you drag a field into it.

To drag a field to open up an area:

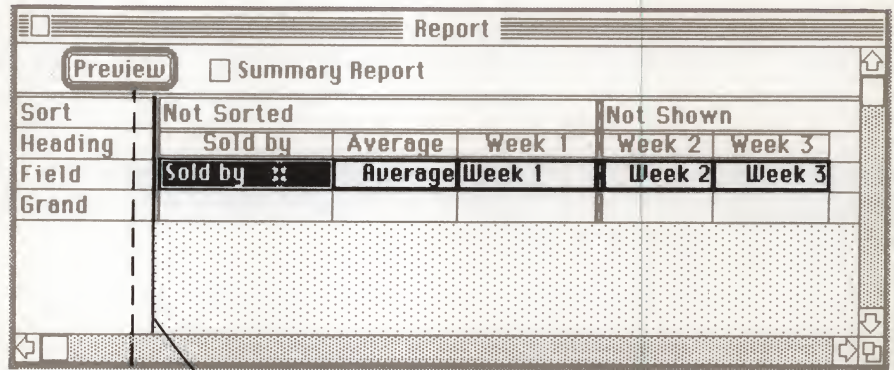
- Drag the field until the dotted line rests on the bold line between the double lines.

The screenshot shows a 'Report' window with a table. The table has columns for 'Sort', 'Heading', 'Field', 'Sold by', 'Average', and 'Not Shown'. The 'Not Shown' column is further divided into 'Week 1', 'Week 2', and 'Week 3'. A dotted line is visible between the 'Average' and 'Not Shown' sections, indicating a hidden area. A line points from the text below to this dotted line.

Sort	A->Z	1->9	Not Shown		
Heading	Sold by	Average	Week 1	Week 2	Week 3
Field	Sold by	Average	Week 1	Week 2	Week 3
by Average					
by Sold by					
Grand					

To open up an area, drag until the dotted line appears in the center of the thick line.

To open the Sort area when it is not visible, drag a field into the left column of titles.



To open the Sort area, drag until the dotted line is to the left of this line.

To format fields in the report:

You can change a field's Display, Align, and Style options in the report window. These options are independent of the options you chose in the form window. For example, you can make a field right-aligned in the form, but center it in the report.

- 1 Double-click on the field you want to format.
- 2 Choose from the available options.

To reset the report window:

If you want to reset the report window as if you had just opened it for the current datafile, use the New Report command.

- 1 Choose Report from the Organize menu to make the report window active.
- 2 Choose New Report from the File menu.

When File resets the window, fields that were sorted in the datafile with the Sort command are placed in the Sort area, fields in the hide area of the current form are placed in the Not Shown area, and all other fields are placed in the Not Sorted area. If you changed the Display, Align, or Style formats for a field in the report window, those changes are lost.

Summary Fields

When you move a field into the Sort area, File adds the field name preceded by the word "by" to the column of titles. The boxes in this row are summary fields. For each of these summary fields, you can specify as many as six mathematical functions that operate on Number fields—for example, subtotals and the average of a group of numbers. You can perform the Count function on fields of any information type. For example, you can count the sales reps for each territory.

To specify a function:

Specify functions in the boxes below the field name that the function will operate on and across from the summary field you want to use.

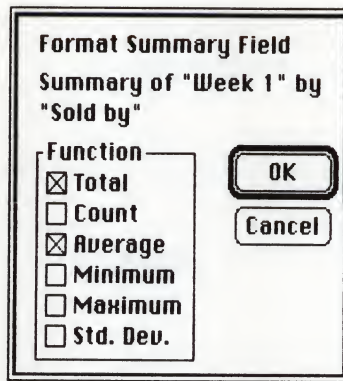
Double-click in this row to specify a function that operates on the "Week 1" field and the "Sold by" summary field.

Sort	A->Z	1->9	Not Sorted	No	
Heading	Sold by	Average	Week 1	Week 2	Week 3
Field	Sold by	Average	Week 1	Week 2	Week 3
by Average					
by Sold by					
Grand					

For example, you may want to total the "Week 1" sales for each sales rep.

- 1 Click in the box you want in the summary row.
- 2 Choose Format Summary Field from the Form menu.
- 3 Choose the functions you want.
- 4 Click the OK button.

Instead of clicking in a box in the summary row and then choosing the Format Summary Field command, you can also double-click in the box.



To specify a Grand summary:

After you choose from the available functions, File places the function names in the box. You can choose more than one function. If all the function names do not appear in the box, and you want to see them, temporarily widen the column.

Aside from the available functions for individual groups of information, you can also specify Grand summary functions for Number fields. The Grand summary field always appears in the report window. As you move fields into the Sort area, the individual summary fields stack up on top of the Grand summary field. Use the Grand summary field for overall totals, averages, and other functions.

- 1 Double-click in the box under a Number field and across from "Grand."
- 2 Choose from the available options.

Report					
<input checked="" type="checkbox"/> Preview <input type="checkbox"/> Summary Report					
Sort	A->Z	1->9	Not Sorted		
Heading	Sold by	Average	Week 1	Week 2	Week 3
Field	Sold by	Average	Week 1	Week 2	Week 3
by Average					
by Sold by			Total, Average		
Grand					

Double-click in this row to specify a Grand summary function.

Changing Column Headings

When you first open the report window, each column heading in the report window is the same as the field name. You can change these headings by editing them as you would text.

In some cases, you may not want a heading above a column.

- 1 Select all the text in the heading.
- 2 Press the Backspace key.

Later, if you decide to include a heading for that column, just select an insertion point in the space that is left above the field and type.

If you don't want any headings above the columns in a report, you can hide the entire heading by dragging the line above the field row up until the headings disappear. If some of your headings are long and you want them to appear as more than one line, you can also drag the heading line down to increase the vertical size for the headings.

To delete a column heading:

Creating Summary Reports

Besides a report that displays every record in a group and all functions you specified for the fields, you can also create a shorter, summary report. A summary report displays only the results of the functions you specified—for example, only subtotals and grand totals. To create a summary report:

- Choose *Summary Report* at the top of the report window.

Previewing Reports

After you have designed your report in the report window, you can see how it will look when it is printed by clicking the Preview button at the top of the report window. Previewing your report before you print lets you check the content of the report, the column widths, and the headings. After previewing, you can go back to the report window and redesign if you need to.

- Click the Preview button.

The first time you preview, File has to sort the records. Then, File displays your report in the preview window. You can view the report in this window as it scrolls.

Stop the vertical scrolling by holding the mouse button down anywhere in the preview window, or by using the horizontal scroll bar to see columns that do not appear on the screen because the report is wide. When you hold the mouse button down in the window or when you click in the horizontal scroll bar, the report stops scrolling. You can also use the Pause button at the bottom of your screen to stop the scrolling.

- Click the Pause button.

The Pause button changes to Resume while you pause.

- Click the Resume button.

If, at any time, you wish to stop previewing and return to the report window, click the Cancel button. When the report preview finishes, the window stops scrolling and the Cancel button changes to the Done button. Click the Done button to return to the report window and make any necessary changes in the report design.

**To preview
a report:**

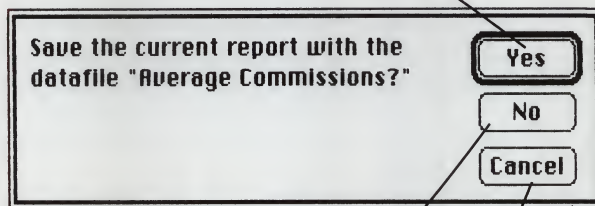
**To pause
during preview:**

**To resume
scrolling:**

Saving and Opening Reports

When you create a report, File saves it along with the datafile. When you quit File or open another datafile, after changing the report design, File asks if you want to save the changes along with the datafile. If you also made changes to the form, File inquires about saving those changes too.

Click the Yes button to save the report along with the datafile.



Click the No button if you don't want to save any changes.

Click the Cancel button to return to the report window.

To save your report changes as you are working, choose Save Report from the File menu when the report window is active.

To save a report separately:

You can also save a report separately from a datafile. You can save either the report design (how the report looks and its information), or the text output. You might save a report design if it is one that you prepare often, and you want to use it with different datafiles or print it directly from the Finder. See Chapter 8, "Printing," for information on printing separate reports.

You could save a report's text output to use as a table in another document, and you could save a summary report's text output so you could use it later as a datafile.

- 1 Make sure the report window is active.
- 2 Choose Save Report As from the File menu.
- 3 Type a name for the report.
- 4 Choose either *Specification* or *Text Output*.
- 5 Click the Save button.

If you choose *Specification*, File saves the design of the report from the report window, the last page setup and print options you specified for reports, and the find information from the last time you searched the datafile. Choose this option to save the design of a report that you want to produce at intervals with the updated information from a datafile.

If you choose *Text Output*, File saves the tabular report output itself as a text document (without the report design). You can use the text output of a report to include in a Microsoft Word document or to use as a data document with Microsoft Word's Print Merge command. See the Microsoft Word manual for more information. You can also use text output from a report as a datafile. See the Save Report As command in "File Reference" for more information.

You can print a separate report directly from the Finder. See Chapter 8, "Printing," for details about printing reports.

When you save a report design separately from a datafile, File creates an icon in the Finder that represents that report:



If you are working in the Finder and want to work immediately with a report design, you can quickly display the report window and start File.

- Double-click on the report icon for the report you want to work with.

This procedure starts File and makes the report window active. If you generate the same report frequently with updated information from a datafile, start File this way, find the information you want included in the report with the Find command, and then print the report in the normal manner.

To start File and open a report:

To open another report:

When you are using a datafile and want to use a report design different from the one saved with that datafile, you can open either another datafile's report or a report that has been saved separately. Find the records you want the report based on and then open the report design.

- 1 Choose Report from the Organize menu to make the report window active.
- 2 Choose Open Report from the File menu.
- 3 Select a name from the list box.
- 4 Click the Open button.

In the list box, File lists reports you have saved separately, and the names of your datafiles, which may or may not have reports saved with them. Select a name from the list to open the report you want. If you select a datafile for which you have not created a report, File displays an error message.

Sometimes, the fields in the opened report may not match the fields in the datafile. If the fields exist in the datafile, but not in the report, they will appear in the Not Shown area of the report window. You can move the fields into other areas if you wish to use them in the report.

If the fields exist in the report you opened, but not in the datafile, they will appear grey in the report window. You cannot preview or print a report that contains grey fields in the Sort or Not Sorted areas. Grey fields do not contain values in the datafile and would appear as blank columns in your report. You can either move any grey fields into the Not Shown area or delete them from the report by using the Clear command. See Chapter 8, "Printing," for information on printing reports.

Note

If you try to preview or print a report with grey fields in the Sort or Not Sorted areas of your report design, File displays an alert box.

Now Try This

In this example, you will use the Three Month Sales Quotas datafile to design a report for Custom Closet's sales manager.

The sales manager needs to know the total sales for January for each territory so she can analyze the sales quotas she has set for the rest of the year.

Now, the Three Month Sales Quotas datafile shows actual sales figures for each sales rep. Notice that there is more than one sales rep for each territory. In the datafile window, you could sort the records according to territory and see the sales figures for each territory more clearly. By designing a report, however, you can group and total all this information easily.

- 1 Make sure you are using View 1 of the Three Month form. Click in the view indicator to change the view if you need to.
- 2 Choose Report from the Organize menu.

If you sorted by the "name" field in the example at the end of the "Sorting Information" section in Chapter 5, the "name" field appears in the Sort area of the report window.

- 1 Drag the "territory" field into the Sort area before the "name" field.
- 2 Drag all the fields except the "actual" field into the Not Shown area. The "actual" field remains in the Not Sorted area.
- 3 Double-click in the summary field below the "actual" field and across from "by territory."
- 4 Choose *Total*.
- 5 Click the OK button.

The word "Total" appears in the summary field to indicate which function you chose. File will total all the actual figures for each territory.

Now, change the heading above the "actual" field to indicate that these are sales figures for the month of January.

- 1 Select the text "actual" in the heading by dragging over it.
- 2 Type *January sales*

Now you are ready to preview your report.

- Click the Preview button.

File first sorts the records according to the fields you moved into the Sort area. And then, File creates your report and displays it in the preview window.

- 1 As soon as the report starts to scroll by, either click the Pause button or hold the mouse button down inside the preview window.
- 2 Make a note of the things you might change to make the report look neater. For example, you may want to center the names of the states in the "territory" column.
- 3 Continue previewing and pausing by clicking the Pause button and the Resume button until the report stops scrolling.

Notice at the end of the report, there is no overall total of actual sales for all territories. Return to the report window and add a Grand summary function.

- 1 Click the Done button.
- 2 Double-click in the Grand summary field below the "actual" field and across from "Grand."
- 3 Choose *Total*.
- 4 Click the OK button.

Now make any changes to the column widths you want by dragging the lines between fields as you would in a List Helper form. Or, change the alignment format of the fields by selecting the field and choosing the Format command from the Form menu.

When you are finished, preview the report again.

- 1 Click the Preview button.
- 2 When you are done previewing, click the Done button.

Notice that after you added the Total function in the Grand summary field, File gave you an overall total of all the territories' "actual" fields.

If you want to print the report you just previewed, see the example at the end of Chapter 8, "Printing." If you quit File in the meantime, save your report with the Three Month Sales Quotas datafile either by choosing the Save command or by clicking the Yes button when File asks if you want to save the report.



8 Printing

This chapter describes how to print records from a datafile, how to print a form, and how to print a report.

You may want to print records in a datafile to get a hard copy of your information or to print mailing labels. Printing a form is useful when you want to show it to someone so they can create one like it.

Most of your printing time, however, will probably be spent printing reports after you have created and previewed them from the report window. See Chapter 7, “Designing Reports,” for information about designing reports.

The commands used for printing are the same for records, forms, and reports. The print and page setup options, however, can be different.

File saves page setup options separately so that you can set different options for records, forms, and reports. File then prints based on the options you set for that type of document.

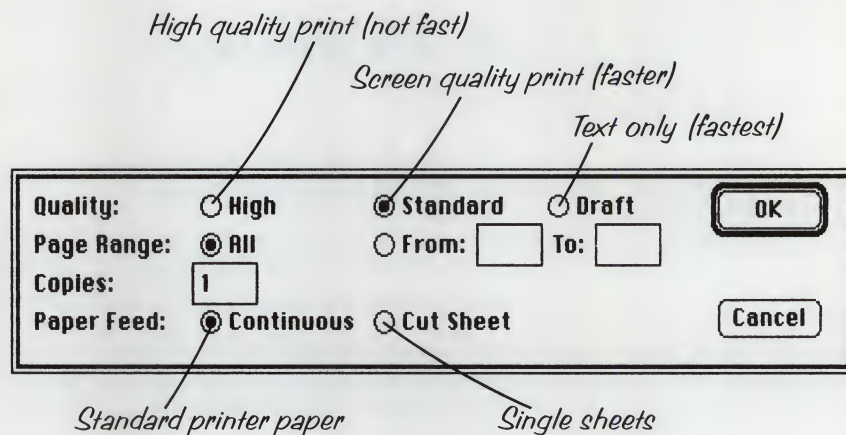
Note

The Page Setup dialog box shown in this chapter appears only if you have an Imagewriter. Daisy Wheel and Laser printers have different options.

You must have an Imagewriter file on the disk you are using if you want to print.

**To print records,
a form,
or a report:**

- 1 Click in the window (datafile, form, or report) to make it active.
- 2 Choose Print from the File menu.
- 3 Choose from the available options.
- 4 Click the OK button.



If you choose *Standard* or *High*, File displays a message at the bottom of your screen as it saves the print file on your disk. If you choose *Draft*, File displays a message that counts the number of records left to print.

If you decide to stop the print process at this time, click the Cancel button in the message box.

If you want to cancel printing in progress:

- Press the Command key and type a period.

To set up the page:

Use the Page Setup command to control how File prints records, forms, and reports on the page. See the explanations in this chapter for different options for records and reports.

- 1 Make the window active (datafile, form, or report) for which you want to set up the page.
- 2 Choose Page Setup from the File menu.
- 3 Choose from the available options.
- 4 Click the OK button.

8 1/2" by 11"

8 1/2" by 14"

8 1/4" by 12"

8 1/2" by 11 3/8" (European standard)

Paper: ☒ US Letter ☐ B4 Letter ☐ US Legal ☐ International Fanfold

Orientation: ☒ Tall ☐ Tall Adjusted ☐ Wide

☒ Print Record Numbers ☒ Print Grid Lines ☐ Mailing Label

Page Header:

Page Footer:

Left Margin: **Right Margin:**

Top Margin: **Bottom Margin:**

Print across the width of page

Print pictures in proportion

Print lengthwise down the page

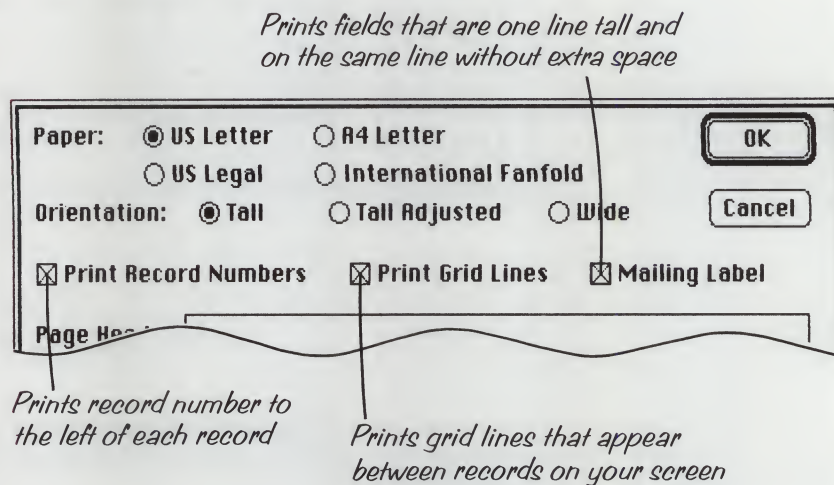
You can type formatting instructions in the text box for the header or footer. These instructions are described in "File Reference" under the Page Setup command.

Printing Records

Print records from a datafile by following the general instructions earlier in this chapter. Make sure the datafile window is active and that the records you want to print are in the window. If you want to print all the records from a datafile, first choose Show All Records from the Organize menu.

File prints the records based on any options you set in the Print or Page Setup dialog boxes for records. File breaks pages between records horizontally and between fields vertically.

These are additional options for printing records:



To print names and addresses as mailing labels:

With File, you can print records that contain “name” and “address” fields as mailing labels.

First, design your form so that only the information you want will be printed on your mailing labels. You may want to include a comma label between a “city” and a “state” field or a “Ship To:” label with a picture of your company’s logo. Move any fields or form labels that you don’t want to print into the hide area.

Use the Find command or the Show All Records command to display in the datafile window the names and addresses you want to print. Before you print the records, choose *Mailing Label* in the Page Setup dialog box for records.

Position the comma label so it touches the "City" field.

Ship John Smith
To: 123 Cherry Lane
Middleton , TX 78020

*Without Mailing Label checked,
File prints extra space within
fields.*

Ship John Smith
To: 123 Cherry Lane
Middleton, TX 78020

*With Mailing Label checked,
File does not print extra
space within fields.*

The mailing label option works only for fields that are one line tall and are on the same line of the form. When printing records with *Mailing Label* checked, File deletes any space left after the values and within the field or label boxes. File prints any space you left outside field and label boxes. Therefore, if you want a comma immediately after the "city" field, create your form so that there is no space between the comma label and the "city" field.

Note

Checking *Mailing Label* only affects printing of records. File will still display records in your datafile window according to the current form.

Printing Forms

Print a form by following the general instructions earlier in this chapter. Make sure the form window is active.

File prints forms based on any options you set in the Print and Page Setup dialog boxes for forms. File breaks pages between fields if you are printing a large form.

Printing Reports

After you have designed a report in the report window and perhaps previewed it, you will want to see it on paper.

Print a report by following the general instructions earlier in this chapter. Make sure the report window is active.

When you print reports, you can choose an additional page setup option:

Paper: ☒ US Letter ☐ A4 Letter
☐ US Legal ☐ International Fanfold

Orientation: ☒ Tall ☐ Tall Adjusted ☐ Wide

☐ Start new page when first column changes

Page Header: _____

OK Cancel

If you want File to print each group of information (based on your first sorted field) on a new page, check this box.

To print a separate report:

You can print a separate report from the Finder without starting File. See Chapter 7, "Designing Reports," for information on saving reports separately.

- 1 Select the icon of the report you want to print.
- 2 Choose Print from the Finder's File menu.

After you choose the Print command, File starts, opens the datafile, and finds the records the report will be based on. Just before it is ready to print the report, File displays the Print dialog box.

- 1 Choose from the available options.
- 2 Click the OK button.

If you want to use a report design with records from a different datafile, see the procedures for opening another report in Chapter 7, "Designing Reports."

Now Try This

If you followed the procedure in the last example, you created and previewed a report for Custom Closet that totalled January's sales figures for each territory. In this example, you will print that report.

- 1 Make sure you are using the Three Month Sales Quotas datafile.
- 2 Choose Report from the Organize menu.

Now that the report window is active, you can choose the page setup options for printing reports.

- 1 Choose Page Setup from the File menu.
- 2 In the page header text box, type *January Sales Report*
- 3 Click the OK button.

Now, print the report.

- 1 Choose Print Report from the File menu.
- 2 Click the OK button.

File prints the report you previewed in the last example with the heading "January Sales Report."

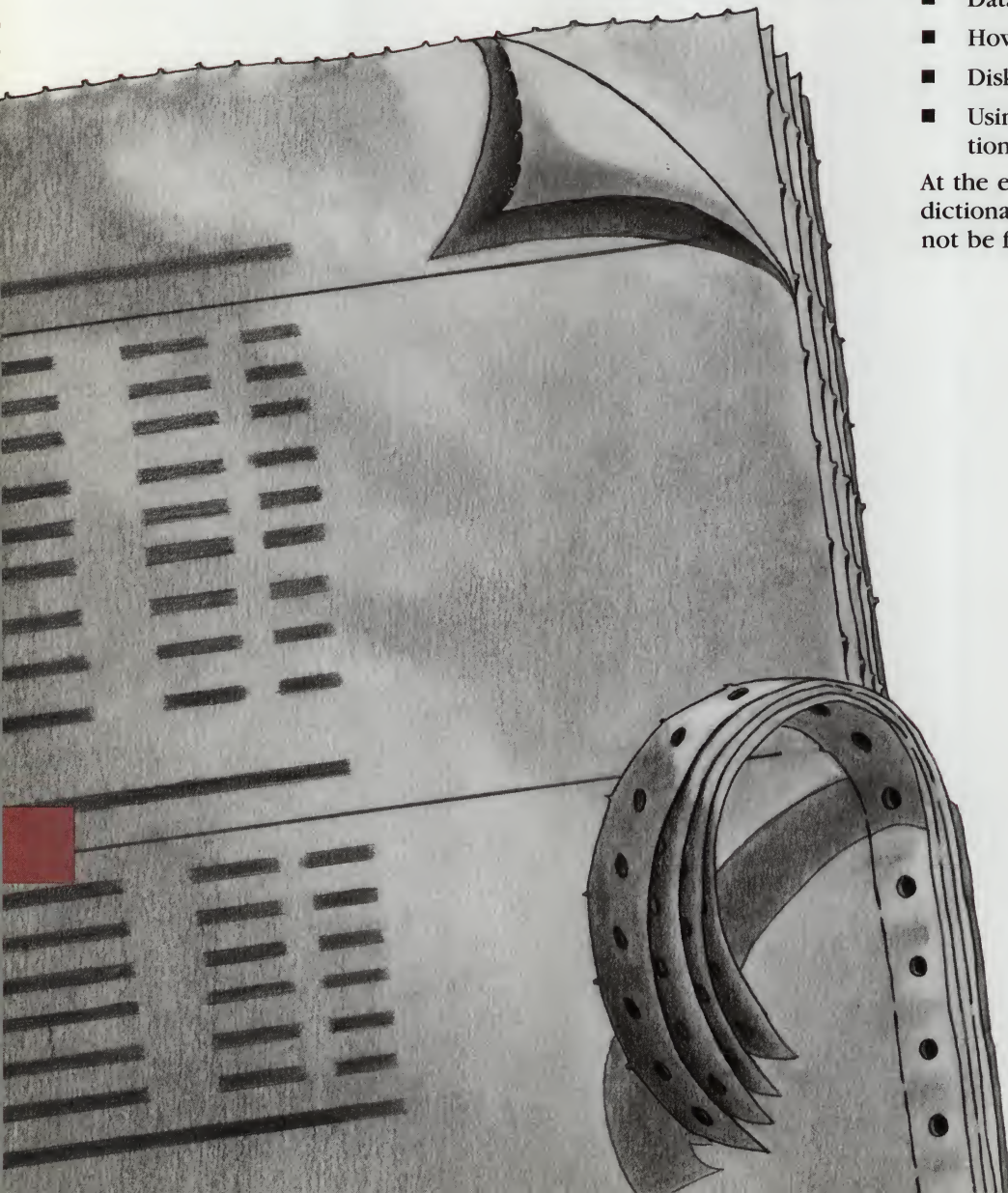
File Reference

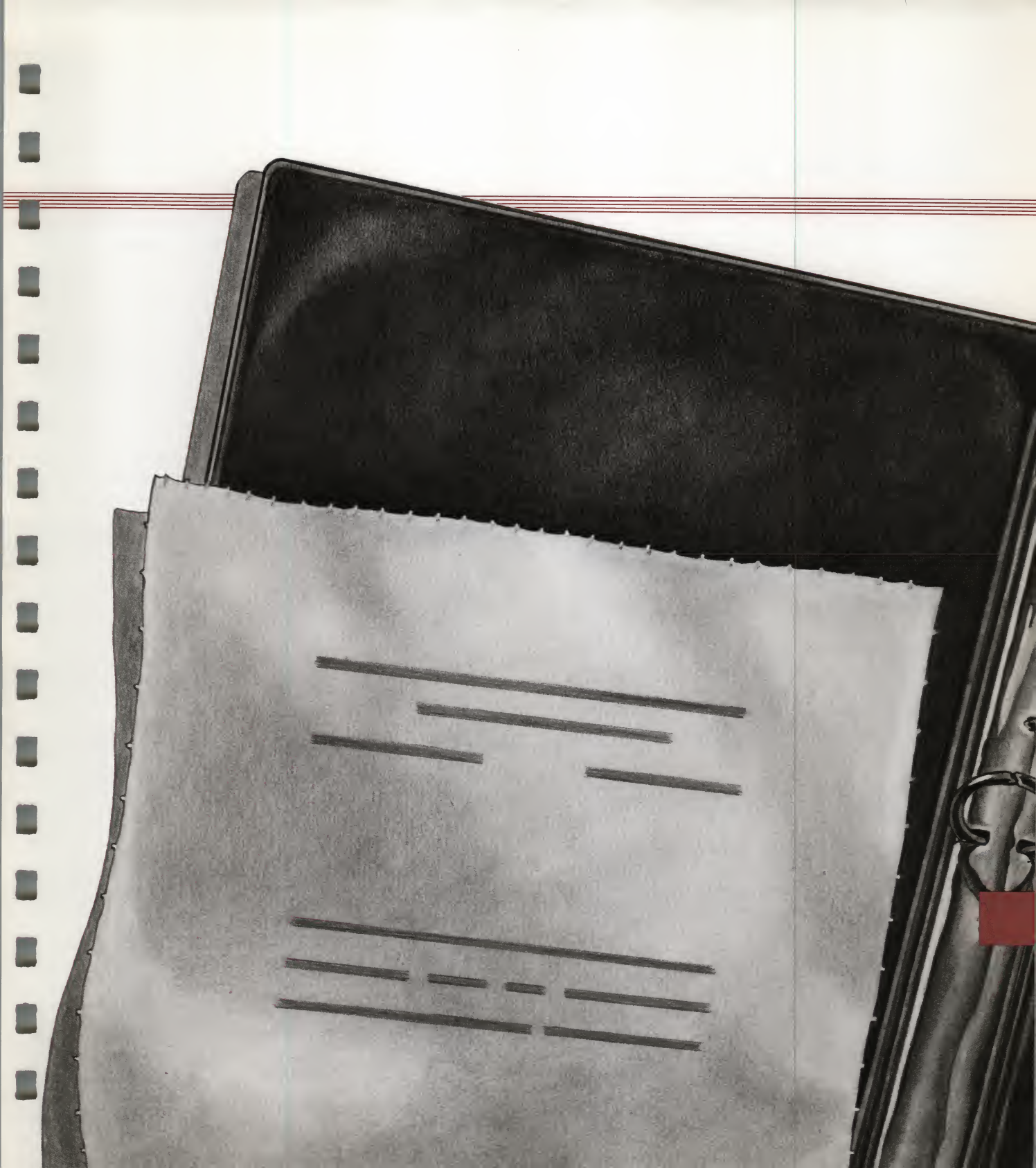
“File Reference” contains a summary of mouse and key procedures, information about each

of the commands in File, and appendices on:

- Datafile and form capacity.
- How File stores data.
- Disk space.
- Using File with other applications.

At the end of “File Reference” is a dictionary of terms that you may not be familiar with, and an index.



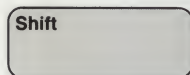


Mouse and Key Summary

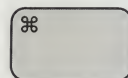
These are mouse and key sequences that can help you work faster with File. The Command key sequences listed here do not have corresponding commands on the menus.



Click



Adds to the previous selection. As long as you press the Shift key while clicking, you continue to add selections. To remove a selection, press the Shift key and click in the selection.



Constrains field movement horizontally or vertically—whichever direction you move first. In this way, you can align fields while designing a form without List Helper. Press the Command key before you start to move the field.



Moves a selected field or label behind other fields when you design a form without List Helper. Normally, a moved field overlaps any fields in the way. Use Option-click to put a Picture field or label behind fields.



Double-click



Document name

Opens that document from either the Finder or from the list in the dialog box. Double-clicking on a report icon in the Finder starts File and opens the report window.



Title bar or size box

Expands the window to take up the full screen. If you double-click again, the window returns to its previous size.



Field, heading, label, or summary field

Brings up the Format dialog box. Choose the formats available for that category.



Record number or form window ruler

Opens the alternate view of the form. If you click a record number in the datafile window, that record will show in the alternate view. Double-click again to bring back the other view.

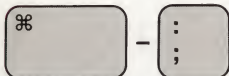
Datafile window only



Copies the value from the same field in the previous record.



Copies the current date from the Macintosh clock.

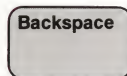


Copies the current time from the Macintosh clock.

Datafile and form window



Opens the alternate view of the form. If you press Command-T in the datafile window, the record you were working with will show in the alternate view. Press Command-T again to bring back the other view.



Clears the selection (value, field, or record). Before clearing fields or records, File asks you to click the OK button to confirm the deletion.



Clears a selected field or record unconditionally. The dialog box asking you to confirm the deletion does not appear. Do not use this key sequence unless you are absolutely sure you want to delete all information associated with that field or record.

Commands

A command is an instruction to Macintosh to perform an action. The commands are arranged here in the order they appear on the pull-down menus.

When you pull down a menu on the Macintosh, some commands may appear dimmed. A command is dimmed when it does not apply to what you have selected or what you are doing at the moment. You cannot choose a dimmed command.

File carries out some commands as soon as you select them. For other commands, File needs more information and presents you with a dialog box. These commands are followed by an ellipsis (...).

The directory on the next page shows the commands on each menu.

Contents

About Microsoft File...

Scrapbook
Alarm Clock
Note Pad
Calculator
Key Caps
Control Panel
Puzzle

File

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Close ⌘W

Save
Save As...

Page Setup...
Print... ⌘P

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Edit

Undo ⌘Z
Cut ⌘H
Copy ⌘C
Paste ⌘V
Clear
Select All ⌘A

Show Clipboard

Form

Show Form ⌘G

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Vertical Form

Format... ⌘D
Set Font...

Organize

Find... ⌘F
Hide Records ⌘H
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Sort... ⌘S

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Menus

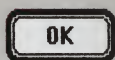
Microsoft File has five command menus: Apple (🍏), File, Edit, Form, and Organize.

- The Apple (🍏) menu is similar to others in Macintosh applications. The About Microsoft File command shows how much memory you have used, and which version of File you are using. It also provides help topics to assist you with whatever task you are performing. Other commands on the menu vary depending upon which desk accessories are on your disk.
- With the File menu commands, you can get datafiles and save parts of datafiles; get and save forms and reports; print datafiles, forms, and reports; and end a File session.
- The Edit menu includes some familiar Macintosh editing commands. You can edit the information in a datafile, cut and paste entire records, and edit in the form or report windows.
- With the Form menu commands you can rearrange how your information looks, specify the types of information you will enter into fields, and change the fonts for fields.
- The Organize menu commands help you find, sort, and report on the information in your datafiles.

Dialog Boxes

A dialog box contains messages requesting more information. Dialog boxes have these features:

Button



Most dialog boxes have OK and Cancel buttons; a few have other buttons instead. Click the OK button to carry out the command. Click the Cancel button to cancel the command. If the button is outlined, pressing the Enter key will carry out the command as well.

These buttons appear in the New, Open, and Save As dialog boxes:

Eject The Eject button ejects the disk from the disk drive so you can insert another disk. File displays the documents from the new disk in the list box.

Drive Click the Drive button to see the documents on the disk in the other drive. This button appears only if you have more than one disk drive.

Other buttons are described under individual commands.

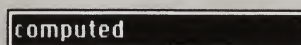
List Box



A dialog box contains a list box when a command can apply to a number of different items (for example, datafiles, fonts, or font sizes). If the entire list doesn't fit, the list box has a scroll bar; scroll to see the rest of the list.

If a dialog box has a list box, select the item you want, then click the OK button, or double-click on the item in the list box.

Text Box



Some dialog boxes have text boxes in which you type a number or some text. File may propose a response; if you want to use what File proposes, just click the OK button. If you want a different response, type the new response. Use the Backspace key to erase typing errors. You can scroll back and forth in the text box by holding the mouse button down and moving the pointer past the edge of the text box in the direction you want to scroll. If there is more than one text box in a dialog box, you can use the Tab key to move from box to box.

Check Box

☒ Commas

Some dialog boxes give you several options. To choose an option, click in the check box next to it. In some cases, the check box may already be checked, indicating that the option or format has been chosen (or is a preset option.) You can click the OK button to use the checked options or formats; or you can click in the box to turn the option off. Some check boxes may be grey when the dialog box appears. This means that the option or format is different for more than one field, heading, or label. Leave the check box grey to keep each item's original format. Check the box to give all the items that format. Uncheck the box to turn the format off for all the items.

Option

☒ Right

Some dialog boxes let you choose only one option from a group of related options. To choose the option, click in the circle next to it. If the option is already chosen and is the option you want, click the OK button in the dialog box.

Apple Menu

About Microsoft File



About Microsoft File displays a dialog box with information about the version of File you are using, memory usage, and help.

The help topics appear in a list box in the dialog box. Select a topic in the list, then click the Help button. File displays a window with information about that topic.

If you then want to see information on another topic, click the Topics button to see a list of help topics. You can also see the next help topic by clicking the Next button; and you can see the previous topic by clicking the Previous button.

An alternative to choosing About Microsoft File is to press Command-? whenever you need help. The mouse pointer changes to a question mark. Move the question mark pointer to the part of your screen where you need help, and choose a command, click in the dialog box, or click in a portion of the window. When you click, File displays the help information in a window. If you ask for information about a dialog box, that dialog box stays on the screen, but is not active.

Once the help information appears, you can use the Next, Previous, and Topics buttons as described above. If you want information about help itself, press Command-? again and File takes you to the description of help.

When you are finished reading the help information and want to return to your work, click the Cancel button.

See *Macintosh*, your owner's guide, for a discussion of the desk accessories listed on the Apple menu.

File Menu

New

File	
New...	⌘N
Open...	⌘O
Close	⌘W

Save	
Save As...	

Page Setup...	
Print...	⌘P

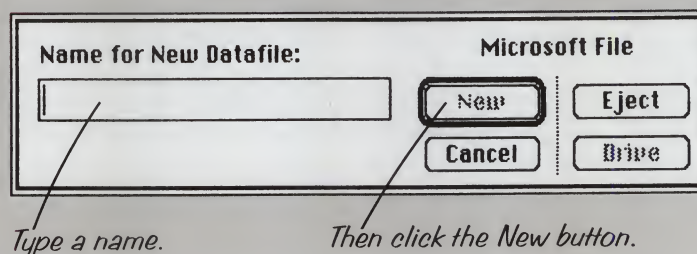
Quit	⌘Q

The New command appears on the File menu as New Datafile when any window other than the report window is active. When the report window is active, New Datafile changes to New Report.

New Datafile

The New Datafile command asks for a name and then creates a new datafile and an empty form window.

File is a little different from other Microsoft applications you may have used on Macintosh. Because information you type in a datafile is immediately saved on your disk, you must name a new datafile first so File knows where to save the information. When you choose this command, File displays a dialog box asking you for a name for the new datafile.



If you want to create a new datafile using an existing form (one from another datafile or one saved separately), you can quickly do so:

- 1 Choose New Datafile and name the datafile.
- 2 Choose Open Form from the File menu and open the form you want.
- 3 After the form is loaded into the new datafile, choose Select All from the Edit menu.
- 4 Choose Format Fields from the Form menu and click the OK button.

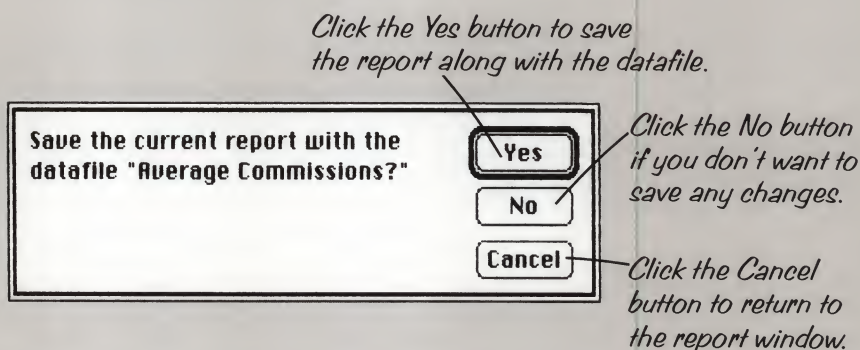
File creates all the fields in the new datafile for you.

For information on creating datafiles and forms, see Chapter 3, "Creating Datafiles."

New Report

The New Report command resets the report window as if you had just opened it for the first time. Fields you previously used to sort with the Sort command are placed in the Sort area, fields above the hide area in the current form are placed in the Not Sorted area, and fields in the hide area of the current form are placed in the Not Shown area.

If you make any changes to the report window before you choose this command, File displays a dialog box:



After you click the Yes or the No button, File resets the report window.

Open

File	
New...	⌘N
Open...	⌘O
Close	⌘W
Save	
Save As...	
Page Setup...	
Print...	⌘P
Quit	
⌘Q	

The Open command appears on the File menu as Open Datafile when any window other than the form or report window is active. The command changes to Open Form when the form window is active. When the report window is active, the command changes to Open Report.

Open gets a datafile, form, or report from the disk and displays it on the screen.

If you make any changes to a form or report before you choose Open, File asks if you want to save those changes with the current datafile before opening another datafile, form, or report.

Save the current form and/or report
with the datafile "Average
Commissions?"

☒ Save Form ☒ Save Report

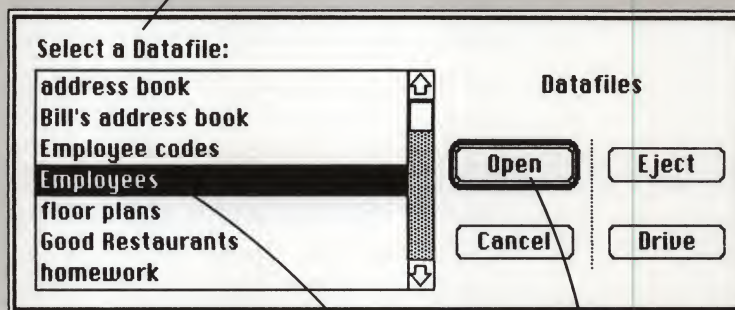
Yes
No
Cancel

*Check to save the form with
the current datafile.*

*Check to save the report with
the current datafile.*

In the dialog box for Open, you will see a list box of datafiles, forms, or reports. Click the name of the document you want to open and then click the Open button, or just double-click on the document name.

The title changes for a datafile, form, or report.



Select a datafile, form, or report from the list box.

Click the Open button.

Open Datafile

Open Datafile gets from the disk a datafile, along with its form (and its report if you have created one), and displays the datafile on the screen, replacing any current datafile.

In the list box, File lists text documents on your disk as well as datafiles. You may have text documents from other applications like Microsoft Word, or from saving records as text with Save Records As. You can use Open Datafile to merge these text documents into a datafile. The values in the text document must be separated by tabs and each line must end with a carriage return. When you open a text document, File does not close your current datafile first. Instead, the information from the text document is merged into your current datafile. File places the information into the datafile by position. If you make a mistake and do not want this information in the datafile, you can delete the records that File added.

Open Form

Open Form gets a form from the disk and uses it to display the current datafile.

In the list box, File includes forms you saved separately from datafiles and forms File saved along with datafiles. A form that File saves along with a datafile has the same name as the datafile. File saves a form with every datafile.

If the form you open contains fields not included in the datafile you are using, they will appear grey in the form window. You can delete these grey fields by choosing Clear from the Edit menu. If you want a grey field to be added to the current datafile, select it and choose Format Field from the Form menu.

If fields exist in the datafile but not in the form you opened, they will appear below the hide line in the form window.

Open Report

Open Report gets a report design from the disk and displays it on the screen.

In the list box, File includes names of reports you saved separately from datafiles, and names of datafiles. These datafiles may or may not have reports saved with them. If you try to open a datafile that does not have a report, File displays a message explaining that you cannot open that report.

If the report you open contains fields not included in the report you were using, they appear grey in the window. You should delete these grey fields either by choosing Clear from the Edit menu, or by moving them to the Not Shown area. You cannot preview or print a report with grey fields. If fields exist in the old report but not in the report you open, they appear in the Not Shown area.

When you open a report, the find information saved with that report becomes the current find information for the datafile.

Close

File	
New...	⌘N
Open...	⌘O
Close	⌘W
.....	
Save	
Save As...	
.....	
Page Setup...	
Print...	⌘P
.....	
Quit	⌘Q

The Close command closes the active window. You can also close the active window by clicking the close box.

When you close the datafile window, File puts the datafile away and closes any form, find, sort, or report windows that are open.

If you made any changes to either the form or report, File asks you if you want to save the changes with the datafile before you close.

File returns you to a blank screen with menus. Then, the only commands you can choose are About Microsoft File, Open Datafile, New Datafile, and Show Clipboard. You can also use the desk accessories on the Apple menu.

Save

File	
New...	⌘N
Open...	⌘O
Close	⌘W
Save	
Save As...	
Page Setup...	
Print...	⌘P
Quit	
Quit	⌘Q

The Save command appears on the File menu as Save Form when the form window is active and as Save Report when the report window is active.

Save Form

The Save Form command saves the form you are using with the current datafile. File saves the form with the same name as the current datafile, and replaces the form previously saved with that datafile.

The form that File saves with a datafile becomes the form you see the next time you use that datafile.

If you want to save a form separately from the datafile, use Save Form As instead of Save Form.

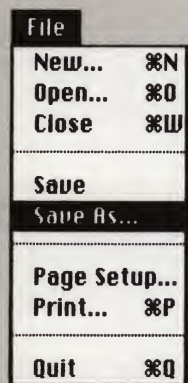
Save Report

The Save Report command saves the report you are using with the current datafile. File saves the report with the same name as the current datafile, and replaces the report previously saved with that datafile.

The report that File saves with a datafile becomes the report you see the next time you use that datafile and open the report window.

If you want to save a report separately from the datafile, use Save Report As instead of Save Report.

Save As



The Save As command appears as Save Records As when the datafile window is active, as Save Form As when the form window is active, and as Save Report As when the report window is active.

The Save As command saves records, a form, or a report separately from the datafile you are working with.

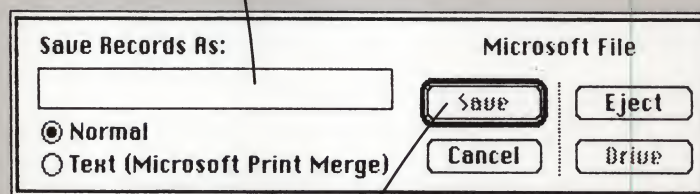
If you type a name that you have used before in the Save As dialog box, File asks you if you want to replace the existing datafile, form, or report. Click the Yes button to replace the document, or click the No button and type a different name for the records, form, or report you want to save. See the following explanations for more information about using an already existing name when you use Save As.

Save Records As

Save Records As saves records currently displayed in the datafile window as a separate datafile and opens that new datafile. File saves the fields that are above the hide area, and the formulas for computed fields that are below the hide area.

When you use Save Records As from a datafile that contains computed fields above the hide area, File calculates the values for the computed fields in each record. In the new datafile File discards formulas for the computed fields, and these fields become regular Number fields. If you want to maintain formulas for the computed fields, drag the fields into the hide area before you choose Save Records As. Then, the formulas transfer to the new datafile.

Type a name for the datafile you are creating from the records in the datafile window.



Then, click the Save button and File opens the new datafile.

Normal Choose *Normal* to save the records as a datafile. Records saved as Normal make a more compact datafile. It's a good idea to save all the records in a datafile this way once in a while to clean up and make maximum use of disk space.

Text (Microsoft Print Merge) Choose *Text* to save the records as a text document that you can use as a Microsoft Word Print Merge document. A text document consists only of values from the datafile records separated by tabs—formats are not included—and one line that contains the field names. File does not save pictures in a text document. See your Microsoft Word manual for more instructions on using Print Merge for form letters.

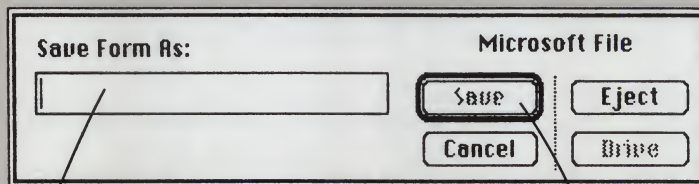
Important

If you use a name that has been used for a datafile before, and click the Yes button when File asks if you want to replace the existing document, File replaces the old datafile with the current datafile or text document.

You cannot save records to your current datafile. If you use the name of the current datafile, File still asks if you want to replace the existing document. If you click the Yes button, File displays a message explaining that you can't replace your existing document.

Save Form As

Save Form As saves a form separately from the datafile you are using.



Type a name for the form you are saving separately.

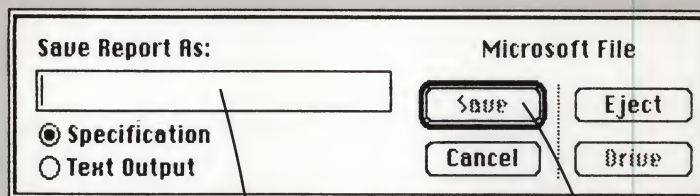
Then click the Save button.

If you give a form a name that is also the name of a datafile, File replaces the form currently saved with that datafile. File does not replace the datafile itself.

If you give a form a name that is also the name of another form, File replaces the old form with the new form.

Save Report As

Save Report As saves a report separately from the datafile you are using.



*Type a name for the report
you are saving separately.*

*Then Click the
Save button.*

If you give a report a name that is also the name of a datafile, File replaces the report currently saved with that datafile. File does not replace the datafile itself.

If you give a report a name that is also the name of another report, File replaces the old report.

Specification Choose *Specification* to save the design of the report (the work you did in the report window).

Text Output Choose *Text Output* to save the report output as text in a tabular format. The columns in this text document are separated by tabs so you can format them in Microsoft Word or other Macintosh word processing software.

Important If you save a report as text output and use a name that is also the name of a datafile, File replaces the datafile with the report text output.

Page Setup

File	
New...	%N
Open...	%O
Close	%W
Save	
Save As...	
Page Setup...	
Print...	%P
Quit	
	%Q

The Page Setup command controls the appearance of a printed document. In File, you can print three kinds of documents: datafile records, a form, or a report. Each document has its own page setup information saved along with it.

- When the datafile window is active, choose the page setup options for printing records.
- When the form window is active, choose the options for printing the form.
- When the report window is active, choose the options for printing reports.

These elements are common to all three Page Setup dialog boxes for the Imagewriter:

Paper: ☒ US Letter ☐ A4 Letter ☐ US Legal ☐ International Fanfold

Orientation: ☒ Tall ☐ Tall Adjusted ☐ Wide

Page Header:

Page Footer:

Left Margin: Right Margin:

Top Margin: Bottom Margin:

OK Cancel

Paper This tells Macintosh what size paper you are using in the printer.

<i>US Letter</i>	Letter size, 8-1/2 by 11 inches
<i>US Legal</i>	Legal size, 8-1/2 by 14 inches
<i>A4 Letter</i>	European letter size, 8-1/4 by 12 inches
<i>International Fanfold</i>	European standard, 8-1/2 by 11-2/3 inches

Orientation

<i>Tall</i>	Vertical orientation
<i>Tall Adjusted</i>	Vertical orientation, prints pictures in proportion
<i>Wide</i>	Horizontal orientation

Page Header What you type here will be printed at the top of each page, one-half inch from the top edge of the paper.

Page Footer What you type here will be printed at the bottom of each page, one-half inch from the bottom edge of the paper.

You can also type instructions in the headers or footers that tell File to align parts of the header or footer to the left, right, or center, or to include the page number, date, or time. You can include any or all of these instructions in a single header or footer.

Type: **To:**

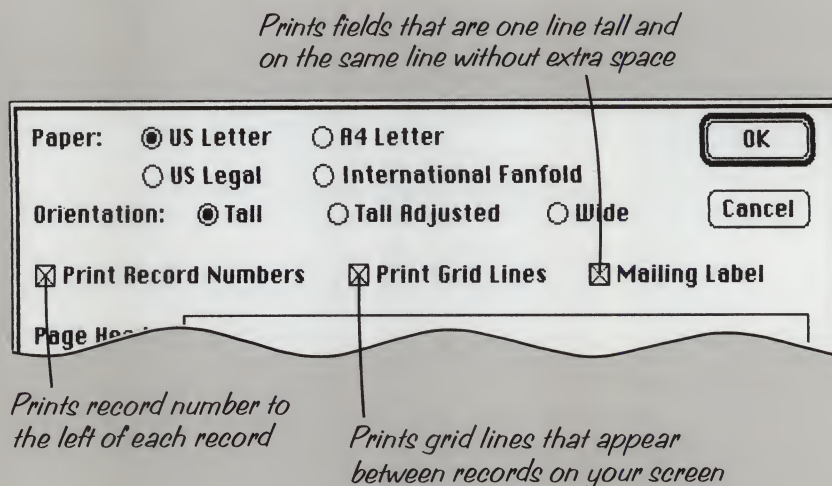
<i>&L</i>	Align the characters that follow at the left margin.
<i>&C</i>	Center the characters that follow.
<i>&R</i>	Align the characters that follow at the right margin.
<i>&P</i>	Print the page number.
<i>&D</i>	Print the current date.
<i>&T</i>	Print the current time.
<i>&&</i>	Include a single ampersand (&).

For example, *&LInvoices&C&P&R&D* would print "Invoices" at the left margin, center the page number, and print the current date at the right margin.

Margins The margins are preset to one inch on top and bottom, and three-quarters inch on the left and right sides. To change the margins, type a number. You can specify a margin in tenths of an inch (for example, *1.5* would be one and one-half inches). Some printers may not accept left or right margins of less than an established minimum. See your printer's manual for guidelines.

Depending on which window is active, the Page Setup dialog box contains additional options.

Datafile Window (Records)



Print Record Numbers This option prints the record numbers to the left of each record.

Print Grid Lines This option prints the lines between records, and, for List Helper, the lines between records and columns.

Mailing Label This option prints records without extra space within fields. The fields you want to print must be only one line tall and on the same line. For more information, see Chapter 8, "Printing."

Report Window

Start new page when first column changes This option prints all the records that have the same value in the first column on a new page. (You must have fields in the Sort area to use this option.)

Paper: ☒ US Letter ☐ A4 Letter
☐ US Legal ☐ International Fanfold

Orientation: ☒ Tall ☐ Tall Adjusted ☐ Wide

☐ Start new page when first column changes

Page Header:

OK Cancel

If you want File to print each group of information (based on your first sorted field) on a new page, check this box.

Print

File	
New...	⌘N
Open...	⌘O
Close	⌘W
Save	
Save As...	
Page Setup...	
Print...	⌘P
Quit	
Quit	⌘Q

The Print command appears on the File menu as Print Records when the datafile window is active, as Print Form when the form window is active, and as Print Report when the report window is active.

The Print command prints the records displayed in the datafile window, prints a form, or prints the report according to the report design.

File prints records, a form, or a report according to the page setup options you set for each.

Quality:	<input type="radio"/> High	<input type="radio"/> Standard	<input checked="" type="radio"/> Draft	OK
Page Range:	<input checked="" type="radio"/> All	<input type="radio"/> From: <input type="text"/>	To: <input type="text"/>	
Copies:	<input type="text" value="1"/>			
Paper Feed:	<input checked="" type="radio"/> Continuous	<input type="radio"/> Cut Sheet	Cancel	

Note This dialog box appears only for Imagewriter printers. Daisy Wheel and Laser printers have different options.

Quality This option determines the number of dots that File uses to form characters on the printed document. *High* prints with a very high density of dots; the dot density of *Standard* is less. *Draft* prints only text—no Picture fields or labels. The printing speed varies according to your response.

Page Range To print all the pages in a datafile, form, or report, choose *All*. To print a range of pages, choose *From: To:* in the dialog box and type a page range.

Copies Type the number of copies you want.

Paper Feed Choose *Fanfold* if you are using continuous form paper. Choose *Cut Sheet* if you are using single sheets of paper.

Print Records

Print Records prints only the records in the datafile window. To print the entire datafile, first choose Show All Records from the Organize menu, and then choose Print Records.

File prints records according to the page setup options for records.

File prints as many complete records on a page as will fit, unless the form is larger than one page. Page breaks occur between fields if List Helper is checked.

Print Form

Print Form prints a form the way it appears in the form window.

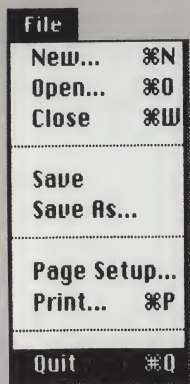
Print Report

Print Report sorts the records, if necessary, according to the report design and then prints the report.

File breaks pages between columns as indicated by the vertical dotted line in the report window.

Before you print, use the Preview button in the report window to see exactly how your printed report will look. Then change column widths, headings, or make any other adjustments you want.

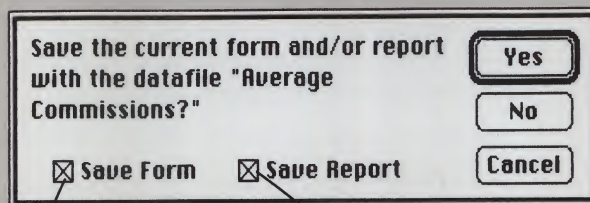
Quit



The Quit command ends a File session.

You do not have to choose Save before you quit File to save changes you made to the information in your datafile. When you quit, File saves all information in the datafile you are working with. Always choose Quit when you are finished working with File. Never turn off your Macintosh without first choosing Quit or you may lose information.

If you make changes to either the form or report you are using with a datafile and you have not saved those changes, Quit brings up a dialog box.



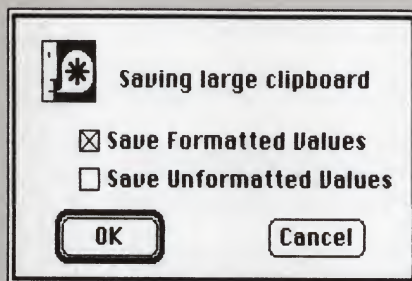
Check to save the form with the current datafile.

Check to save the report with the current datafile.

Note

If you made your copy of File into a startup disk, File will eject your disk and ask for one with a Finder when you quit. See Appendix C, "Disk Space," for more information on making your File disk a startup disk.

If the Clipboard has more than five records in it when you quit, File asks how you want to save them. See the Show Clipboard command for information on using the Clipboard.



Save Formatted Values This option saves the values as you see them in the datafile window. Save records as formatted if you are using the Clipboard to transfer them to Microsoft Word or another word processor.

Save Unformatted Values This option saves the values without File display formats. For example, the formatted number "\$10.123" would be saved unformatted as "10.12." Save records as unformatted if you are using the Clipboard to transfer them to Microsoft Multiplan or another electronic worksheet program.

Edit Menu

Undo

Edit	
Undo	⌘Z
Cut	⌘H
Copy	⌘C
Paste	⌘V
Clear	
Select All	⌘A
Show Clipboard	

The Undo command reverses your most recent editing of information in the datafile window and the find window, and your most recent editing of labels or headings in the datafile window, form, or report.

The command that will be undone appears after “Undo” on the menu (for example, “Undo Paste”). This command changes if you choose another command from the edit menu.

You cannot undo format changes, cutting and copying of entire records in the datafile window, or clearing of fields in the form window.

Once a command has been undone, Undo changes to Redo on the menu: Redo reverses Undo. Undo and Redo stay on the menu until you do any non-text editing.

When you undo Cut or Copy, File replaces what you just put into the Clipboard with whatever was there before you chose the command.

Cut

Edit	
Undo	⌘Z
Cut	⌘H
Copy	⌘C
Paste	⌘V
Clear	
Select All	⌘A
Show Clipboard	

The Cut command deletes a selection and puts it into the Clipboard, replacing anything that may already be there.

Use Cut to delete a value from one field in your datafile and put it into the Clipboard. Then you can paste it back later into another field. Select the information and then choose Cut as you would in other Macintosh applications.

You can also use Cut to delete entire records or groups of records from your datafile. You can then paste them into another datafile. Select the record(s) by clicking in the record number or dragging from record number to record number.

Once you delete a selection from a window, you can paste it back using the Paste command. Whether you paste records back into the same datafile or into a different datafile, File always pastes records at the New record position at the end of the datafile window. See the Paste command for more information.

Note

If you use Cut to delete records, be sure you want to delete them. You cannot undo cutting of records. As long as the records are still in the Clipboard, however, you can paste them back in.

Copy

Edit		
Undo		⌘Z
Cut		⌘H
Copy		⌘C
Paste		⌘V
Clear		
Select All		⌘A
Show Clipboard		

The Copy command copies a selection and puts it into the Clipboard, replacing anything that is already there. Use Copy to duplicate information from one record in a datafile, so you can paste the information into another record.

You can also use Copy to duplicate entire records or groups of records from your datafile. You can then paste them into another datafile. Select the record(s) by clicking in the record number or dragging from record number to record number.

After you copy a selection, you can paste it back with the Paste command. Whether you paste records into the same datafile or a different datafile, File always pastes records at the New record position at the end of the datafile window.

Paste

Edit	
Undo	⌘Z
Cut	⌘H
Copy	⌘C
Paste	⌘V
Clear	
Select All	⌘A
Show Clipboard	

The Paste command inserts the contents of the Clipboard at the insertion point, or replaces a selection with the Clipboard contents.

When you are editing information in records of a datafile, use Paste along with Cut and Copy, as you would for other Macintosh applications.

When the Clipboard contains entire records from a datafile, you can paste them into the same datafile you cut or copied from, or into a different datafile. File always pastes records at the New record position at the end of the datafile window. If you select a record other than the New record before you paste, File presents a message explaining where it will paste the records. Click the OK button and File pastes the records.

When you paste records into the same datafile, File places the fields in order by field name. If you rearranged the fields on the form before you pasted, File puts the fields from the pasted records in the new order.

When you paste records into a different datafile, File asks:

Paste values into fields:

☒ By name ☐ By position

OK Cancel

Choose to link the contents of the fields to be pasted with the field names in the other datafile.

Choose to ignore the field names and paste the values according to where they were in the old form.

Note

If you want to transfer records between datafiles with the Cut, Copy, and Paste commands, do not quit File before you paste. If you quit File and then return to a datafile to paste back records, File pastes by position and deletes Picture fields, as well as any fields in the hide area of records you were transferring.

Clear

Edit	
Undo	⌘Z
Cut	⌘H
Copy	⌘C
Paste	⌘V
Clear	
Select All	⌘A
Show Clipboard	

The Clear command deletes the contents of the selection without affecting the current contents of the Clipboard. Use Clear to delete information from a datafile as you would for other Macintosh applications. You can also use the Backspace key instead of Clear. To retrieve text that you cleared, choose Undo.

You can use Clear to delete a field from the form or a record from a datafile. After you select the field(s) or record(s) and choose Clear, File displays a message asking you to confirm clearing the fields or records.

Click the OK button to delete the fields from the form and the information in each record from the datafile, or to delete the records from the datafile.

Important Be sure you want to delete the selected fields or records from your datafile since you cannot undo clearing of fields or records.

If you are sure you want to delete the field or record from your datafile, press Command-Option-Backspace, and File does not display the alert before it deletes the information.

Select All

Edit	
Undo	⌘Z
Cut	⌘H
Copy	⌘C
Paste	⌘V
Clear	
Select All	⌘A
Show Clipboard	

The Select All command extends an insertion point or current selection to include everything in the next higher grouping. For example, if you select two letters in a field value in the datafile window, Select All selects the entire field. Then, choosing Select All again selects the entire record.

If a record is selected or if nothing is selected, Select All selects all records displayed in the datafile window. In the form window, Select All selects all the fields.

Show Clipboard

Edit	
Undo	⌘Z
Cut	⌘H
Copy	⌘C
Paste	⌘V
Clear	
Select All	⌘A
Show Clipboard	

The Show Clipboard command opens the Clipboard window and displays its contents.

Use the Clipboard to move information or records from one datafile to another datafile, or to another Macintosh application.

When the Clipboard contains information from a record in a datafile, it displays the information (for example, "Michigan"). When the Clipboard contains records from a datafile, it displays the number of records it contains (for example, "3 records").

To close the Clipboard window, click its close box or choose Close from the File menu.

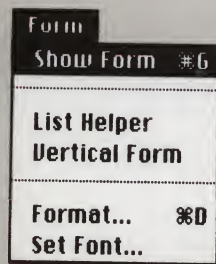
File saves the contents of the Clipboard when you quit File or any other application. If the Clipboard contains records with Picture fields or fields in the hide area, File does not save those fields when you quit.

You may cut or copy pictures from Microsoft Chart or MacPaint into the Clipboard, so you can paste them into a File datafile. When you start File, remember to choose Paste before you choose Cut or Copy so you don't lose the contents of the Clipboard.

For more information on using File with other Macintosh applications, see Appendix D, "Using File With Other Applications."

Form Menu

Show Form



The Show Form command opens the form window and displays the current form.

To save time when you work often in the form window, expand the window to full screen so that File doesn't have to redraw the datafile window for each change you make. To make the window take up the entire screen, double-click either in the title bar or in the size box. When you finish making changes, double-click again and the window will return to its previous size and position.

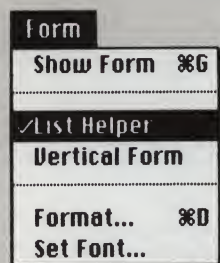
The box in the bottom left of the form window indicates which view of the current form is displayed. When you are working in the form window, you can see the other view by:

- Clicking in the view indicator ("View 1" or "View 2").
- Double-clicking in the ruler.
- Pressing Command-T.

When you are working in the datafile window, you can see the other view by double-clicking in the record number of the record you want to see, and also by pressing Command-T.

To close the form window, click its close box or choose Close from the File menu.

List Helper



The List Helper command determines what kind of forms you create by controlling how File moves and sizes fields in the form window. When File first starts, the List Helper command is checked. To uncheck List Helper, choose it on the File menu. To check it again, choose the command again.

When List Helper has a check mark next to it, you can design only forms that look like lists with information in columns. File arranges fields horizontally within the area between the hide line and the headings. You can move the fields within this area or down below the hide line. Size the fields by dragging the lines between them or by dragging the line below them. When you size or move fields with List Helper, other fields move to open or close up space. In a List Helper form, you can see the heading in the datafile window whether or not it is visible in the form window.

When you check List Helper after working with a non-List Helper form, fields move into columns. Fields that were above the hide line are still visible but in a horizontal format. Fields that were below the hide line remain there. File removes headings and labels that are not associated with fields.

For more information on designing forms with List Helper, see “Working With List Helper” in Chapter 6, “Designing Forms.”

When List Helper does not have a check mark next to it, you can design more complex forms. You can move fields to any position in the form, move the hide line to open up more space for your form, and add labels for fields.

When you first uncheck List Helper, fields remain in their previous positions, but you can move them anywhere.

For more information on designing forms without List Helper, see “Working Without List Helper” in Chapter 6.

Vertical Form

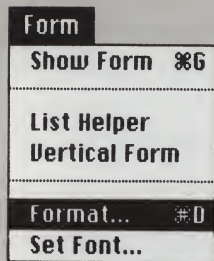
Form	
Show Form	%G
List Helper	
Vertical Form	
Format...	%D
Set Font...	

The Vertical Form command unchecks List Helper, aligns fields in the form vertically, and creates labels at the left of each field. The size of individual fields does not change, and fields in the hide area remain hidden. File removes labels that are not used for fields and closes the area for the heading.

All fields align vertically at the left of the form when you choose this command. You may have to open the form window and drag the hide line down to see all the fields in each record.

After choosing Vertical Form, you can make further changes to the form's design.

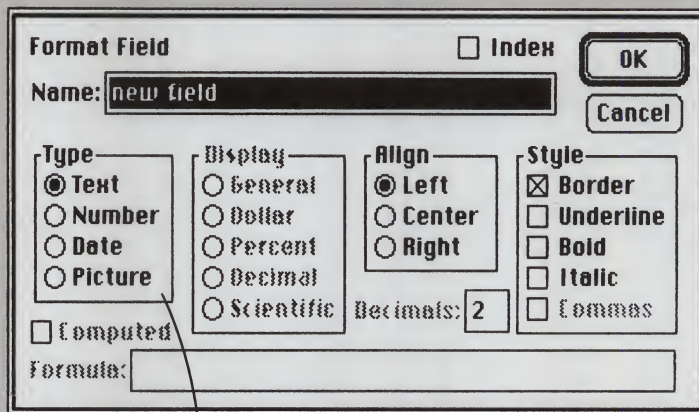
Format



The Format command presents a dialog box in which you can choose options that affect how File stores and displays your information. The Format command changes on the Form menu depending upon the type of field or labels you have selected. You can also use Format to add grey fields from a form to the current datafile.

When you create a field and choose Format, File presents a dialog box in which you can change the field's information type. After you open another datafile, quit File, or add information into that field in the datafile window, you cannot change the information type for that field. The dialog box then contains only formats for that specific type.

This is the dialog box that allows you to change the information type. When you choose different types, the options in the dialog box change accordingly.



When you first create a field, you can change the information type here.

If you select a group of fields, File displays a dialog box with formats common to the group.

These formats are common to most Format dialog boxes:

Name You can change the name of the field by typing in this box. Headings and labels do not have this text box.

Index Choose this option to provide an index for the field. File uses this index to find and sort information more quickly.

Align Choose *Left*, *Center*, or *Right* to specify alignment of the value in the field.

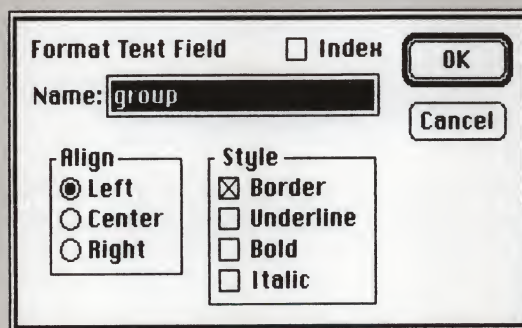
Style Choose from *Border* (non-List Helper only), *Underline*, *Bold*, *Italic*, and *Commas* (Number fields).

The following sections describe each information type and its available formats.

Format Text Field

Format Text Field presents a dialog box with formatting options only for Text fields.

After you open another datafile, quit File, or add information in a field, you cannot change the information type.



The dialog box for a Text field contains only options available for Text fields.

Format Number Field

Format Number Field presents a dialog box with formatting options only for Number fields.

Format Number Field ☐ Index **OK**

Name: **Cancel**

Display

- ☒ General
- ☐ Dollar
- ☐ Percent
- ☐ Decimal
- ☐ Scientific

Align

- ☐ Left
- ☐ Center
- ☒ Right

Style

- ☒ Border
- ☐ Underline
- ☐ Bold
- ☐ Italic
- ☒ Commas

Decimals:

Display With this option, you specify how File displays numbers.

If you choose: Numbers appear like this:

<i>General</i>	5
<i>Dollar</i>	\$5.00
<i>Percent</i>	500%
<i>Decimal</i>	5.00
<i>Scientific</i>	5.00E+00

Decimals Type a number to indicate the number of decimal places in the number. The number you type affects every number display except General.

Format Number Field (as Computed)

When you have a computed field selected, Format Number Field presents a dialog box with formatting options only for computed Number fields.

Format Number Field

Name:

Display

- ☒ General
- ☐ Dollar
- ☐ Percent
- ☐ Decimal
- ☐ Scientific

Align

- ☒ Left
- ☐ Center
- ☐ Right

Decimals:

Style

- ☒ Border
- ☐ Underline
- ☐ Bold
- ☐ Italic
- ☒ Commas

Formula:

OK Cancel

Computed Number fields have the same formats as regular Number fields.

Write the formula for the computed field here.

Formula Type a formula for a computed field using field names, numbers, and these symbols:

Symbol:	Means:
+	Add
-	Subtract
*	Multiply
/	Divide
()	Group operations

You cannot refer a computed field to itself (directly or indirectly) in the formula. See "Number Fields" in Chapter 3, "Creating Datafiles," for more information on writing computed field formulas.

Format Date Field

Format Date Field presents a dialog box with formatting options only for Date fields.

Format Date Field ☐ Index OK

Name: Cancel

Display

☐ Short

☒ Medium

☐ Long

Align

☒ Left

☐ Center

☐ Right

Style

☒ Border

☐ Underline

☐ Bold

☐ Italic

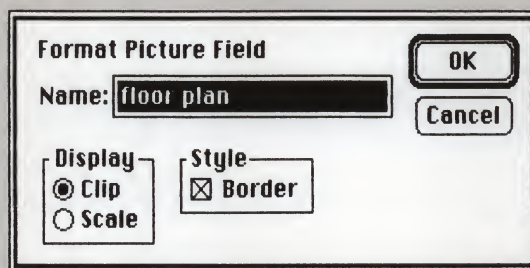
Display With this option, you specify how File displays dates.

If you choose: Dates appear like this:

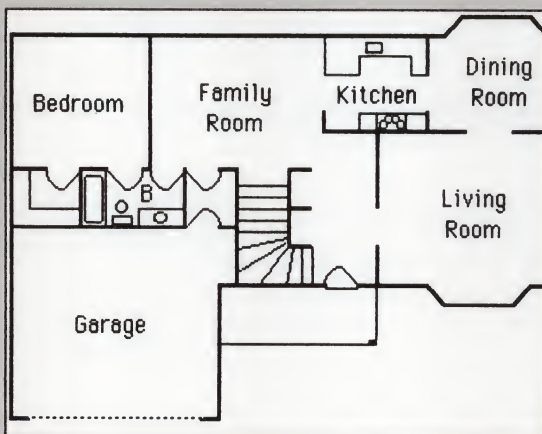
<i>Short</i>	10/26/59
<i>Medium</i>	Oct 26, 1959
<i>Long</i>	October 26, 1959

Format Picture Field

Format Picture Field presents a dialog box with formatting options only for Picture fields.

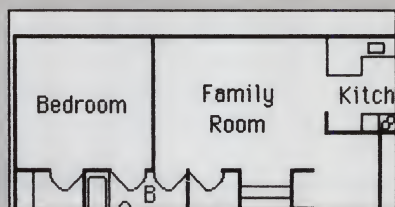


Display With this option, you specify how File displays pictures.
If you have a picture like this:

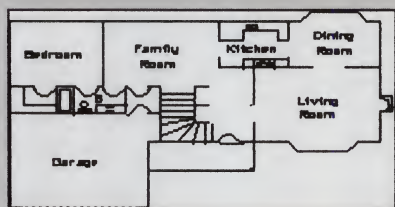


Then if you choose: Pictures appear like this:

Clip



Scale



Style Choose to border or not border the picture.

Format Summary Field

Format Summary Field presents a dialog box with the functions available only for a summary field.

Format Summary Field only appears on the Form menu if you have a summary field selected in the report window.

Calculates the sum of the numbers in a column.

Counts the entries in a column.

Calculates the average of the numbers in a column.

Gives the smallest of all numbers in a column.

Gives the largest of all numbers in a column.

Calculates standard deviation of the numbers in a column.

The dialog box is titled "Format Summary Field" and "Summary of 'city' by 'last.name'". It contains a list of functions with checkboxes: Total, Count, Average, Minimum, Maximum, and Std. Dev. There are "OK" and "Cancel" buttons on the right. Lines connect the descriptive text on the left to the corresponding checkboxes in the dialog box.

Format Summary Field	
Summary of "city" by "last.name"	
Function	<input type="checkbox"/> Total
	<input type="checkbox"/> Count
	<input type="checkbox"/> Average
	<input type="checkbox"/> Minimum
	<input type="checkbox"/> Maximum
	<input type="checkbox"/> Std. Dev.
<input type="button" value="OK"/> <input type="button" value="Cancel"/>	

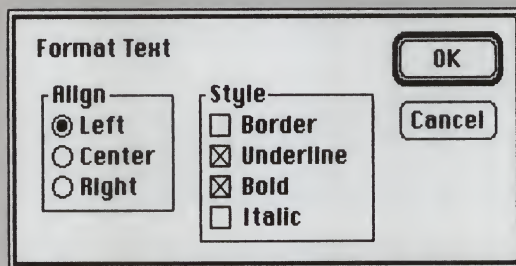
The standard deviation formula is:

$$s = \sqrt{\frac{\sum x^2 - \frac{(\sum x)^2}{n}}{n - 1}}$$

All functions except Count must be used on Number fields. Count can be used on any type field.

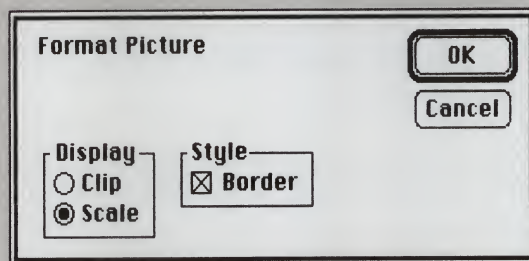
Format Text

Format Text presents a dialog box with formatting options only for a text label or for a heading.



Format Picture

Format Picture presents a dialog box with formatting options only for a picture label (or for a picture label you moved into the heading).



Display With this option, you specify how File displays picture labels. See the options for Picture fields for more information.

Set Font

Form	
Show Form	⌘G
List Helper Vertical Form	
Format...	⌘D
Set Font...	

The Set Font command changes the font for the selected fields, labels, or headings.

The 'Set Font' dialog box contains the following elements:

- Font Name:** A list box showing available fonts: Chicago, New York, Geneva, and Monaco. It has up and down arrow buttons on either side.
- Font Size:** A text field showing the number '12', with up and down arrow buttons on either side.
- Buttons:** 'OK' and 'Cancel' buttons in the top right corner.

Select from available
sizes or . . .

. . . type a different size.

Scroll to see the
available fonts.

The fonts in the system file on your startup disk are listed in the list box. Scroll to see the available fonts, choose one, and select or type a font size. You can type font sizes from four to 127 points. If you type a size different from the ones available for a particular font, File provides the size as closely as possible. The results may look ragged.

If you want to use fonts different from the ones on your disk, you can use the Font Mover to add or delete fonts. See *Macintosh*, your owner's guide, for details.

Organize Menu

Find

Organize	
Find...	⌘F
Hide Records	⌘H
Show All Records	

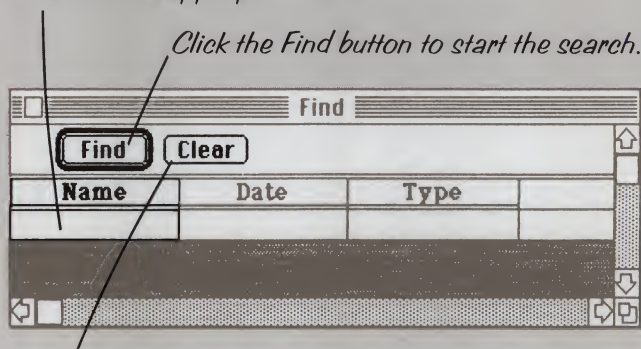
Sort...	⌘S

Report...	⌘R

The Find command gets certain records from the datafile and displays only those records in the datafile window. If you are using a large datafile, you should index the fields you find most often. File then finds them more quickly. See Chapter 3, "Creating Datafiles," for more information on indexed fields.

When you choose Find, File presents a window that looks like the current form. In the appropriate field or fields, you can type a find operator along with the information you want to find.

Type an operator and what you want to find in the appropriate field.



Click the Clear button to clear all information you typed.

File always searches the entire datafile (not just the records displayed) when you use Find. If you type information in more than one field of the find window, File finds only the records that match all the criteria.

File displays records in the datafile window as they are found. Click the Cancel button in the status box and File stops searching.

File saves the find information you specify. When you want to find the same records again, you can choose Find and click the Find button.

You use operators to tell File what to look for:

Operator:	<i>Finds values that:</i>
None	Match anything that begins with what you type
=	Match exactly what you type
< > or > <	Do not match what you type
>	Are greater than what you type
<	Are less than what you type
>=	Are greater than or equal to what you type
<=	Are less than or equal to what you type
...	Are within the range you specify

Note	When you use no operator or the = operator, you can use commas to specify more than one item.
-------------	---

You can also use wildcard symbols:

Symbol:	<i>Finds values that:</i>
*	Match any number of characters in that position
?	Match a single character in that position

If the value you want to find includes an operator, put the operator in double quotes. See Chapter 5, "Organizing Datafiles," for more information on how to use operators and symbols.

Hide Records

Organize	
Find...	⌘F
Hide Records	⌘H
Show All Records	
Sort...	⌘S
Report...	⌘R

The Hide Records command removes a record or a group of records from the datafile window but not from the datafile itself.

Since you prepare reports from the records in the datafile window, you can use Hide Records to remove records that you do not want to delete from the datafile, but that you do not want to include in a report.

Hide Records is dimmed on the menu if you don't have any records selected.

Show All Records

The Show All Records command puts in the datafile window all the records in the current datafile.

Organize	
Find...	⌘F
Hide Records	⌘H
Show All Records	
<hr/>	
Sort...	⌘S
<hr/>	
Report...	⌘R

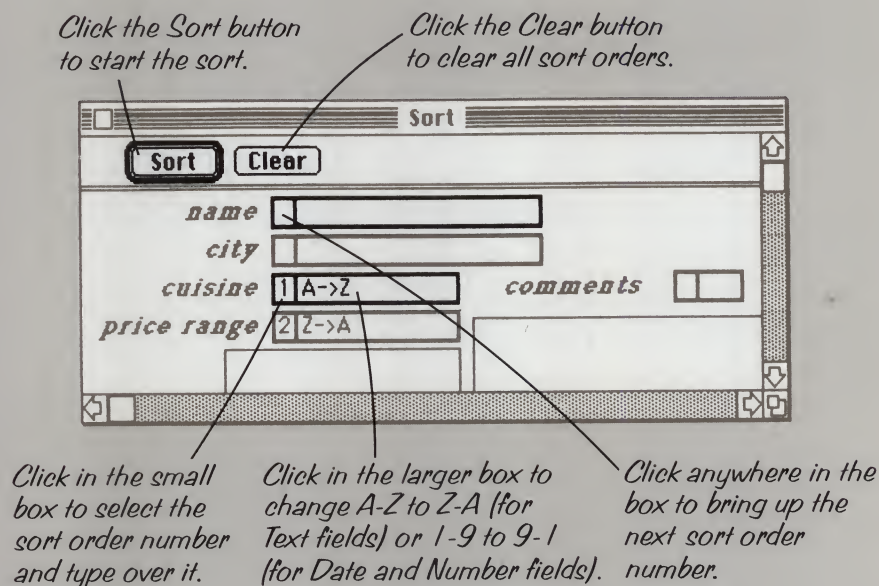
Sort

Organize	
Find...	⌘F
Hide Records	⌘H
Show All Records	
<hr/>	
Sort...	⌘S
<hr/>	
Report...	⌘R

The Sort command orders the records that appear in the datafile window. If you want to sort all the records in a datafile, choose Show All Records before choosing Sort.

When you choose Sort, a sort window appears that looks similar to the form for the current datafile. Each field has two boxes—a smaller one in which you click to specify the sort order (1, 2, 3...9), and a larger one in which you specify how File should order the sorted records.

- Text fields sort alphabetically. You can order them from A to Z or from Z to A.
- Number fields sort numerically. You can order them from least to greatest or greatest to least (represented by “1->9” and “9->1”).
- Date fields sort chronologically (also represented by “1->9” and “9->1”).
- You cannot sort Picture fields.



You can use the Tab key to move from field to field and then type the sort order number. Pressing the spacebar switches between “A->Z” and “Z->A” or “1->9” and “9->1.” When there is not yet a sort number in a field, press the spacebar to add the next sort number. Press 0 (zero) or the Backspace key to clear a field. Click the Clear button to clear all fields in the sort window. Click the Cancel button in the status box to cancel the sort process.

Sorted records stay ordered only during the current session with the datafile or until you add or find more records. File displays the records in random order again when you come back to the datafile after quitting File or working with another datafile. If you want to order the records as they were last sorted, choose Sort. File remembers the information you specify in the sort window, so you can click the Sort button and File sorts accordingly.

Report

Organize	
Find...	⌘F
Hide Records	⌘H
Show All Records	
<hr/>	
Sort...	⌘S
<hr/>	
Report...	⌘R

The Report command prepares a tabular summary of the records displayed in the datafile window.

When you choose Report, a report window appears. In a report, File arranges the fields from the datafile much as it arranges a List Helper form. The first time you choose Report, the fields you have used to sort the records appear in the Sort area of the report window. Any fields in the hide area of the form appear in the Not Shown area.

Move fields by dragging from this row only.

Click the Preview button to see how your report will look when printed.

Change how a field is sorted by clicking here.

Click in a box to choose a function for the field above.

The screenshot shows a window titled "Report". Inside, there is a "Preview" button and a checkbox for "Summary Report". Below these are three main columns: "Sort", "Not Sorted", and "Not Shown". Each column has a header row with "Field", "Name", "Date", and "Type" respectively. Under "Sort", there is a row for "by Name" and a "Grand" row with "Count". The "Not Sorted" and "Not Shown" columns have empty rows for "Date" and "Type". The bottom of the window has a shaded area with a dotted pattern, representing the data records.

*Sort area:
Move fields you want
sorted in the report
into this area.*

*Not Sorted area:
Move fields that will
make up the rest of
the report into this area.*

*Not Shown area:
Move fields you
do not want
included in the
report into this area.*

The columns in the window become the columns in the printed report. The summary fields in each column become totals or other functions under each column in the printed report. The fields in the "Grand" row become the grand totals or other functions at the bottom of the report.

Preview After setting up your report, click this button to see how the printed report will look. When the preview window appears, your report scrolls by. If you hold down the mouse button in the window, scrolling stops until you release the button. You can also stop scrolling by clicking the Pause button. Resume scrolling by clicking the Resume button. You can use the horizontal scroll bar to see more of a wide report. When the preview is finished, click the Done button to return to the report window.

Summary Report Choose this option to include only the summary fields and their functions in the report.

After you design a report, print it by choosing Print from the File menu while the report window is active.

For more information on designing reports, see Chapter 7, "Designing Reports." For more information on printing reports, see Chapter 8, "Printing."

Appendix A

Datafile and Form Capacity

Unless you are using File for unusually large datafiles and forms, you do not have to limit the sizes of datafiles, records, fields, or forms.

The number of records that File can find or sort at once depends upon how much memory your Macintosh has. When the result of a find or sort is more than approximately 5000 records on a 128K Macintosh, File may display an "Out of memory" message.

The figures listed below represent maximum capacities for each datafile and form.

Datafile

Records in a datafile	65,535
Fields in a record	1,023
Characters in a field	32,767

Form

Length in inches	455
Width in inches	455
Characters in a field name	31
Characters in a computed field formula	255
Characters in a text label	32,767

Appendix B

How File Stores Data

File generates and uses several kinds of data:

Datafiles	Consist of record and field data
Forms	Consist of formatting information
Find and sort information	Used to locate and order records
Report designs	Consist of formatting and summary information used to generate a printed report
Page setup information	Includes margins and headers used when you print

File stores data in four different types of documents: datafile, index, form, and report. Each is represented by a different type of icon on your disk.

Datafile Document



Datafile

A datafile document contains:

- Records and fields.
- A form.
- Find and sort information.
- Report design (optional).
- Page setup information.

You will probably use datafile documents most often. They contain everything you need to use File.

If you want to create several different forms or report designs to use with a datafile, use the Save Form As or the Save Report As commands to create form or report documents that are separate from the datafile document. Then, you can choose the Open Form or Open Report command to use these separate forms or reports with the current datafile.

When you open a datafile document from the Finder, File starts with that datafile; its form; the find, sort, and page setup information; and the report design, if you have created a report for that datafile. When you print a datafile document from the Finder, File prints the datafile using the form and page setup information stored in that datafile.

Index Document



Index

Index is a format available for Text, regular Number, and Date fields. For a datafile that contains indexed fields, File creates an index document, which contains special find information. This special information helps File easily find information based on a particular field or fields in a datafile. The index document is much like the index at the back of a book. The name of the index document is the name of the datafile document followed by the word "index."

If you copy or rename a datafile document that has an associated index document, be sure to also copy or rename the index document. Otherwise the fields you indexed will no longer be indexed. If you delete an index document from your disk, all indexed fields in the datafile change to non-indexed.

Form Document



Form

A form document contains a form, find and sort information, and page setup information. You create a form document when you use the Save Form As command to save a form separately from a datafile. You can use the Open Form command to use a form with any datafile. When you open a form document from the Finder, File opens the datafile that you last used with that form. When you print a form document from the Finder, File prints the form using the page setup information stored in that form document.

Report Document



Report

A report document contains a report design, find and sort information, and page setup information. You create a report document when you use the Save Report As command to save a report separately from a datafile. You can use the Open Report command to use a report with any datafile. When you open a report document from the Finder, File opens the datafile that you last used with that report.

When you print a report document from the Finder, File creates a report based on the report design, and the find, sort, and page setup information. In creating a report, File uses the datafile that you last used with that report document. Therefore, you can update information in a datafile and then, from the Finder, easily print different reports that contain the new datafile information.

Storing Text



letter

A text document consists of field values separated by the tab character, with a return character at the end of each record. File can create text documents from the records in a datafile document or from the report output in a report document. And, File can use text documents from other applications like Microsoft Word and other word processors.

If you want to create a text document from records, use the Save Records As command and choose *Text* in the dialog box. In this text document, File includes the field names separated by tabs on the first line. If you want to create a text document from report output, use the Save Report As command and choose *Text Output* in the dialog box.

If you want to merge the contents of a text document into a datafile, use the Open Datafile command. In the list box, File includes text documents you created with File, and those from other applications.

Appendix C

Disk Space

When you receive your File master disk, there may be little extra space on the disk for your work.

The File master disk includes the following documents and folders:

- The File application
- The Macintosh system folder
- The Good Restaurants and Three Month Sales Quotas datafiles.

As you work, File needs space on the program disk for temporary documents. File uses these documents for storing records in the Clipboard and for sorting. You should leave some free space on your copy of the File disk for these temporary files. If you see the “Disk full” message, particularly after sorting records, you need to increase the amount of free space on your disk.

Using File With an External Drive

File operates most efficiently with an external disk drive. With an external drive, you can store documents on a disk separate from your File disk. You don’t need the File program on this “document disk.”

When you create datafiles, click the Drive button in the startup dialog box to create on the other drive.

When you open documents, click the Drive button to see a list of documents on the disk in the external drive.

When you save forms and reports separate from datafiles, use the Save As command and click the Drive button to save your document on the disk in the external drive. File saves documents on the disk named in the upper right portion of the Save As dialog box. This disk will be the one you specified the last time you clicked the Drive button.

When you save forms and reports along with a datafile, use the Save command to save the form or report on the disk that the datafile is on.

To move documents to the external disk:

Click the Drive button to save the document to the external drive before you click the Save button when you save records, forms, or reports. Or click Eject to eject either disk, and replace it with a disk that has space on it.

Using File With One Drive

If you have one disk drive, you may need to move or delete some documents from your copy of the File disk to create more space.

Important Never alter the File master disk.

When you use File with one disk drive, you need the File program on each File disk you use, because File needs to read parts of the program as you work. You will probably find it inconvenient to use “document disks” (formatted disks containing documents only), because you will have to swap disks frequently.

If you move all unneeded fonts and documents from your copies of the File disk, you will be able to store more datafiles on each copy of the disk.

To free disk space:

- Make your datafiles more compact (see the procedure below).
- Move fonts that you rarely use off the disk. Use the Font Mover on the Macintosh Utility disk.
- When you finish “Learning File,” and the examples in “Using File,” remove the Good Restaurant datafile, the Three Month Sales Quota datafile and their index documents from your copy of the File disk. You can also remove the two datafiles you created, Address Book and Sales Quotas.
- When you are familiar with File, move the help document to another disk.
- Make your copy of the File disk a startup disk. See “Making File a Startup Disk” below for details.

To store a compact datafile:

After you add, sort, and find records from a datafile, File may not store the datafile on disk as efficiently as possible. While working with File, you can store a more compact copy of the datafile you are using.

- 1 Choose Show All Records from the Organize menu.
- 2 Choose Save Records As from the File menu.
- 3 Name the new datafile with a different name.
- 4 Click the Save button.
- 5 Remove your old datafile from the disk.

If you want to move the datafile to another disk, click the Eject button to eject the disk, and replace it with a disk that has space on it.

You can also move forms and reports on another disk by making the form or report window active, choosing the Save As command, naming the form or report, and clicking the Eject button to save to another disk.

Using a Hard Disk

If you are using File with a hard disk, copy your File master disk using the following procedure.

- 1 Open the desktops for your File master disk and your hard disk.
- 2 Move the File documents and folders to the desktop for the hard disk.

Warning

Do not use the Macintosh Disk Copy utility to copy the master disk. Do not completely replace the contents of the hard disk with the File disk, unless the hard disk is empty.

Making File a Startup Disk

If you need more space on your disk, you can make your copy of the File disk a startup disk and remove the Finder from the disk. (The Finder takes up about 55K on your disk.) Then every time you turn on your Macintosh and insert your copy of the File disk, the File program loads automatically. This means that when you insert your disk, the first thing you see will be File's startup dialog box instead of the desktop.

To copy onto a hard disk:

To make File the startup disk:

Because Macintosh does not allow you to delete the Finder from the startup disk, you need to start with another disk if you are going to remove the Finder from the File disk.

- 1 Insert a disk with the Finder on it (other than File).
- 2 If you do not have an external drive, eject the disk.
- 3 Insert your copy of the File disk. If you have an external drive, insert the File disk in the external drive. Click on the File icon. Do not double-click.
- 4 Choose Set Startup from the Finder's Special menu.
- 5 You will see an alert box asking you to verify that you want File as the startup application. Click the OK button to continue.

This makes File the startup program. Now you can discard the Finder.

To discard the Finder:

- 1 Double-click to open the System Folder.
- 2 Drag the Finder icon to the trash can.
- 3 When you choose the Empty Trash command from the Special menu, or eject the disk, File deletes the Finder.

Note that when you use File as a startup disk, you cannot manipulate documents using the Finder. You will need to insert a disk containing the Finder, eject it, then insert the altered File disk to move, copy, or delete documents.

If you do not have a Finder on another disk drive when you quit, File ejects the disk and asks for one with the Finder on it.

Appendix D

Using File With Other Applications

You can use File with other Macintosh applications to mix datafile records with graphics or text. Use the Clipboard for moving small amounts of information between applications. Or, you can use text documents—either for moving text from other applications to File or for moving File text to other applications.

When you use text documents to move information, follow these general guidelines:

- From File to other applications: Save the datafile or report as a text document and load this document into an application like Microsoft Word or MacWrite.™
- From other applications to File: Organize your text document by separating values with the tabs and each line with carriage returns. File interprets each tab-separated value as a field and each return-separated line as a record. Then, open the text document from File's Open Datafile dialog box to merge the text document into an existing datafile.

The following sections describe how to move information between File and specific applications.

Microsoft Word or MacWrite

You can save File records or reports as text so that you can use them in Microsoft Word or MacWrite documents.

The following procedure explains how to save File records for use with Microsoft Word's Print Merge. Use this same procedure for saving records to use with MacWrite.

To use records as a Word merge document:

When you want to print form letters using the information from your datafiles, you can use the datafile records that contain the information as a merge document for Microsoft Word's Print Merge.

- 1 Design the datafile's form so that fields are in the order you want for your Word merge document or MacWrite document.
- 2 Find and sort the records you need by using the Find and Sort commands.
- 3 Choose Save Records As from the File menu.
- 4 Name the document.
- 5 Choose *Text (Microsoft Print Merge)*.
- 6 Click the Save button.

File saves the records as a text document. The first line of this document contains field names separated by tabs (header record). The rest of the lines are records separated by returns with field values separated by tabs. You can copy this document to your Word disk to use as your Word merge document or to your MacWrite disk to use as tabular text.

See your Microsoft Word manual for details on using Print Merge.

To move a report to Word or MacWrite:

You may want to include a report you designed in File in a Word or MacWrite document.

- 1 Design the report in the report window.
- 2 Choose Save Report As from the File menu to save the report separately from the datafile.
- 3 Name the report.
- 4 Choose *Text Output*.
- 5 Click the Save button.

File saves the report columns separated by tabs. Now you can copy the report document to your Microsoft Word or MacWrite disk.

You can use unformatted documents from Microsoft Word or MacWrite directly with File, to add records to an existing datafile.

To load a Word or MacWrite document into File, first make sure field values in the text document are separated by tabs and that each line ends with a return. If you want to use a tab within a field value, type quotation marks around the field value. If you want to include quotation marks within a field value, type two quotation marks where you want one to appear.

To move Word or MacWrite text into File:

Then, choose *Text Only* to save the document in Word or MacWrite. Using the Finder, copy this text document onto your File disk. The text document appears in the list box when you use File's Open Datafile command.

Then, when you are working with File:

- 1 Open an existing datafile.
- 2 Set up the datafile's form to match the order of the values you set up in the text document.
- 3 Choose Open Datafile from the File menu.
- 4 Select the text document you copied from Word or MacWrite.

File adds each tab-separated value as a field within a record and each line as a record at the end of the datafile. File discards any extra values.

When you copy text into File from Word or MacWrite using the Clipboard, you need to prepare the fields in the File document first. You should also keep in mind that all formatting to the Word document will be lost, except for tabs, which File will read as separators.

When you paste text into File, you can paste either into a field or into records. Select an insertion point in a field to paste the Clipboard contents into that field. Or, select the New record to paste the Clipboard contents into records at the end of your datafile.

You can use the Scrapbook if you want to copy more than one piece of text at a time.

Microsoft Multiplan

You can move records from File into Multiplan or parts of Multiplan worksheets into File using the Clipboard.

- 1 Select the records you want to move to Multiplan.
- 2 Choose the Copy command from the Edit menu.
- 3 Quit File.
- 4 Start Multiplan, select a cell, and choose Paste.

If you copied more than five records to the Clipboard, File asks how you want to save the values when you quit. Choose *Save Unformatted Values*.

When you want to move parts of Multiplan worksheets to File, copy the cells you want to move to the Clipboard. Then, after starting File, arrange a datafile's form to accommodate the cell contents, select the New record, and choose Paste.

To move File records to Multiplan:

To move File records to Chart:

Microsoft Chart

You can transfer records from File into a Chart data series using the Clipboard.

- 1 Copy the records you want to move to the Clipboard.
- 2 Quit File and start Chart.
- 3 Select an insertion point in the New Series window.
- 4 Choose Paste from the Edit menu.

Chart creates series from the File records. See your Microsoft Chart manual for details.

You can also copy the data series from Chart to a File datafile using the Clipboard. File reads data from Chart as text.

To move a chart from Chart to File:

You can use File to keep track of all the charts you've created with Microsoft Chart. Use the Clipboard to move your charts into a datafile:

- 1 Copy the chart to the Clipboard (choose *As Shown on Screen*).
- 2 Quit Chart and start File.
- 3 Select a Picture field in a record of the datafile window or select an insertion point in the form window if you want to use the chart as a picture label. Labels can only be used in non-List Helper forms.
- 4 Choose Paste from the Edit menu.

Choose *Scale* when you format the Picture field to display a large chart.

MacPaint

You can transfer pictures from MacPaint into either fields or labels.

Before you can move a picture into a field in a datafile, the field must be formatted as a Picture field.

To move a picture into a field:

- 1 Create the picture in MacPaint.
- 2 Copy the picture to the Clipboard.
- 3 Quit MacPaint and start File.
- 4 Open the datafile and select the Picture field in the datafile window in the record you want to move it to.
- 5 Choose Paste from the Edit menu.

To use a picture as a label:

Pictures can only be used as labels in non-List Helper forms.

- 1 Create the picture in MacPaint.
- 2 Copy the picture to the Clipboard.
- 3 Quit MacPaint and start File.
- 4 Open the datafile you want and choose Show Form from the Form menu.
- 5 In the form window, click to select an insertion point.
- 6 Choose Paste from the Edit menu.


To move a picture from File into MacPaint:

- 1 Select the Picture field or label, and copy it to the Clipboard.
- 2 Quit File and start MacPaint.
- 3 Select an insertion point and choose Paste from the Edit menu.

Scrapbook

Use the Scrapbook when you want to move many items from one application to another.


To move items into the Scrapbook:

- 1 Choose Cut or Copy from the Edit menu to move the selection to the Clipboard.
- 2 Choose Scrapbook from the Apple () menu.
- 3 Choose Paste from the Edit menu.

Repeat this procedure for each item you want to copy to the Scrapbook.

To move items from the Scrapbook:

First, quit the application you were using and copy the Scrapbook file to the disk that has your copy of the destination application. Then:

- 1 Start the application.
- 2 Choose Scrapbook from the Apple () menu.
- 3 Scroll in the Scrapbook until you find the item you want to move.
- 4 Choose Cut or Copy from the Edit menu to move the selection to the Clipboard.
- 5 Close the Scrapbook.
- 6 Select an insertion point and choose Paste from the Edit menu.

Repeat this procedure for each item you want to move from the Scrapbook.

Note

When you transfer information using the Scrapbook, be sure the Scrapbook file is on the same disk as your copy of the destination application.

Terms

Active window

The window to which your next command will apply. A window is active when it is in front, and has scroll bars and a highlighted title bar. Available commands on menus change depending upon which window is active.

Character

Any number, letter, punctuation mark, symbol, or special mark (for example, @, !, *, %, \$) that you type.

Check box

A small square box that appears in a dialog box for choosing an option. Clicking an empty check box puts a check in it and chooses the option. If the box is already checked, clicking removes the check and cancels the option.

Choose

To pick a command from a menu or to pick an option.

Click

To press and release the mouse button.

Column

In List Helper, a vertical strip in the datafile window that contains each record's instance of a field. Each column has a heading in the datafile window that starts out as the field's name. *See also* "Heading" and "List Helper."

Computed Number field

One of two kinds of Number fields. A computed Number field stores the formula you write when you set up the field. The field value is derived from another field or fields and any mathematical operation you specify in the formula. *See also* "Number field" and "Regular Number field."

Datafile

A document that stores information in records. A datafile is like a file folder that holds information. Datafile records are presented in the datafile window.

Date field

A field that displays a combination of text and numbers to describe a day of the year. File displays dates in short, medium, or long formats.

Dialog box

A box where you make choices or provide information needed to complete a command.

Document

A file you save on a disk. Common types of File documents are datafile documents (which File automatically saves for you), form documents, report documents, index documents, and text documents.

Double-click

To point to what you want to select or activate, and then press and release the mouse button twice in quick succession. For details on the tasks you can perform with File by double-clicking, see "Mouse and Key Summary" in "File Reference."

Drag

To hold the mouse button down while moving the mouse, and then to release it. Dragging is a common way to move items in a window.

Field

A place in a form for an individual piece of information. A field is like a placeholder for the information in your datafile. You create fields in the form window by typing in the New field. *See also* "New field."

Field name

The identifier for a field. You give a field a name when you first create it in the form window. You can change the name of a field in the text box in the Format dialog box.

Find

To search through your datafile for values in records that match what you specify. After you choose the Find command, File presents a find window that looks like the current form. In the appropriate field, type the value you want to find, and any operators or symbols.

Font

The design of the characters in which text is displayed or printed. The fonts on your disk may vary. You can move fonts to or from your File disk with the Font Mover.

Font size

The height of a font measured in points. One point equals 1/72 of an inch.

Form

The design for a datafile. In the form window, you specify what fields File will include in the datafile, where the fields will be placed, the fields' information type, and how File displays the information that you enter into the fields in the datafile. You can save a form either along with a datafile or as a separate document.

Format

An option for a field or label that determines how a value appears in a field. Formatting options appear in a dialog box, when you choose the Format command.

Formula

A string of mathematical operations and field names that defines a computed Number field. You write a formula in a text box in the Format Computed Field dialog box. *See also* "Computed Number field."

Grand summary field

A box in the report window across from "Grand" in the title column. You can double-click in a Grand summary field to specify functions for your report.

Heading

A name that appears above a field name in List Helper forms and in the report window.

Hide area

The large dotted area at the bottom of the form window. Fields or labels placed in the hide area are hidden from view in the datafile window but are not deleted from the datafile.

Hide line

The line separating the hide area from the rest of the form. When List Helper is unchecked, you can drag the hide line up or down to decrease or increase the size of your form.

Highlight	An area appearing in reverse video to indicate a selection. When a field is selected, the entire box is highlighted. When a heading or label is selected, the small thin bar at the top of the box is highlighted. When a record is selected, the entire record is highlighted.
Index	A document that File creates when you choose the index option for a field in the Format dialog box. File uses this index as you would use the index at the back of a book. File can find and sort information based on an indexed field faster.
Information type	A classification of data. File accepts four information types: Text, Number, Date, or Picture. Specifying an information type helps you control the kind of data that can be entered into a field and how File sorts that data. <i>See also</i> "Text field," "Number field," "Date field," and "Picture field."
Insertion point	A blinking vertical line indicating where characters will be inserted when you type. When you make the datafile window active, click to select an insertion point. When you make the form window active, the insertion point is in the New field. When you type in any window, the window scrolls to show the insertion point.
Label	Text or a picture that you create in a non-List Helper form to be displayed in every record in the datafile. A label can describe the contents of a field. For example, you might have a label "Address:" that describes three fields named "street," "city," and "state."
List Helper	A feature that arranges fields in a datafile in columns. List Helper is a command on the Form menu. When checked, List Helper is on. When List Helper is not checked on the Form menu, you are free to create more complex forms. <i>See also</i> "Column."
Mailing Label	An option in the Page Setup dialog box for records. When you choose this option, File prints any fields or labels that are on the same line and are one line tall (for example, names and addresses) without extra space within the field box.
Master disk	The disk you receive in your Microsoft File package. This disk contains a special identification that Macintosh must read when you first start File after turning on the Macintosh. You can make as many copies of the master disk as you want. If Macintosh needs to read the identification at any time, you will be prompted to insert the master disk.
New field	The empty field in the form window where you can add a field. The New field is usually to the right of the last field you created. In the form window an insertion point is always in the New field so if you type, File automatically scrolls there.
New record	The empty record in the datafile window where you can add a record. The New record is always at the end of the list of records in the datafile window.

Not Shown area

The area at the right of the report window. Fields you place here do not appear in the report.

Not Sorted area

The area of the report window between the Sort area and the Not Shown area. Fields you place here are not sorted in the report.

Number field

A field that displays numbers that can be used mathematically. *See also* "Regular Number field" and "Computed Number field."

Operator

A symbol you use in the find window to further qualify the information you want File to search for (<, >, and = are examples of some operators).

Options

A group of related choices in a dialog box. You can choose one from the group.

Paste

To insert into a document whatever you last cut or copied to the Clipboard.

Picture field

A field that stores pictures from a graphics program like Microsoft Chart or MacPaint. You can use pictures in File only in Picture fields or labels.

Point

To move the mouse pointer over a particular spot.

Pointer

The small shape on your screen that tracks the movement of the mouse. See "Using the Mouse with File" at the end of "Learning File" for more information on pointers.

Preset option

Information already supplied by File in a dialog box. You can replace a preset option with your own response.

Preview

To look at a finished report before you print it. Click the Preview button in the report window and File scrolls your report in the preview window.

Record

A group of fields in the datafile window that consists of all the fields from the form.

Regular Number field

One of two kinds of Number fields. A regular Number field stores the value you enter into the field. *See also* "Number field" and "Computed Number field."

Report

A tabular summary of the information in a datafile, in which you can perform mathematical functions on groups of records.

Ruler

A measuring tool that appears at the left of the form window. The form ruler allows you to size your form in inches.

Save

To store a permanent copy of a document on your disk. File automatically saves datafiles on the disk for you. You can save forms and reports along with a datafile document by using the Save command. You can also save forms and reports as separate documents by using the Save As command.

Scroll	To move the contents of a window or a field so that a different part of it is displayed. You can scroll a window by dragging the scroll box or by clicking in the arrows at either end of the scroll bars. You can scroll a field by selecting an insertion point in the field and dragging to the right or the left.
Select	To pick the record, field, label, or character that will be affected by the next command you choose.
Selection	The highlighted item or group of items that will be affected by the next command you choose.
Sort	To order datafile records alphabetically (for Text fields), numerically (for Number fields), or chronologically (for Date fields). Picture fields cannot be sorted. Sort appears as a command on the Organize menu. You can also sort within a report by moving fields into the Sort area. <i>See also</i> "Sort area."
Sort area	The area at the left of the report window. Fields you place here are sorted and are the first columns in the report.
Summary field	A box in a row of the report window across from a field in the Sort area. In this box, you double-click to specify up to six mathematical functions for Number fields. You can specify the Count function for any type field. <i>See also</i> "Grand summary field."
Summary report	A report that displays only the results of the functions you specify—for example, subtotals and grand totals.
Text box	A place in a dialog box to type information. If there is more than one text box in a dialog box, you can use the Tab key to move from box to box.
Text document	A document that consists of field values separated by tabs, and records ending with carriage returns. You can save records or reports as text documents to use with Microsoft Word (for Print Merge) or MacWrite. While working with an existing File datafile, you can open text documents from other applications and add the text as records.
Text field	The preset information type for a field. Use Text fields for displaying letters, spaces, and numbers that are descriptive and not to be used mathematically.
Typeface	<i>See</i> "Font."
Undo	To reverse the most recent editing command with the Undo command. Undo can also be reversed by choosing it again when it changes to "Redo" on the Edit menu.
Value	The contents of a field in the datafile window. Value can refer to the contents of any type field: Text, Number, Date, or Picture.

Vertical form

A command on the Form menu that turns List Helper off, arranges fields in a form from top to bottom, and provides a label for every field. *See also* "List Helper."

Wildcard symbol

Either the asterisk or the question mark used in the find window to specify strings of characters (*) or a single character (?).

Window

A frame that displays information. You view datafiles, forms, reports, find information, and sort information through separate windows.

Wordwrap

Automatic shifting of a word to the next line. When you type in a field or label more than one line tall, if what you type does not fit completely on a line, File automatically places the whole word on the next line.

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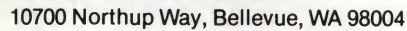
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